1ST AVENUE NE
RETAIL MARKET STUDY
SUMMARY REPORT

prepared for:
The 1st Avenue NE Business Association &
The City of Calgary Planning & Building Department

prepared by:
Walker Brown Urban Consultants Ltd.
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Introduction

This report summarizes the findings of the 1st Avenue NE Market Study. The study has been undertaken by Walker Brown Urban Consultants Ltd. on behalf of the 1st Avenue NE Business Association and The City of Calgary Planning & Building Department. The terms of reference for the study can be summarized as follows:

- determine the existing market base and the most appropriate future role (local, regional, etc) for businesses on 1st Avenue;
- determine the types of retail uses and the total retail floorspace potential along 1st Avenue;
- examine the potential role of the hospital frontage on the south side of 1st Avenue in terms of accommodating future retail development;
- recommend appropriate marketing strategies to achieve the retail potential of the area;
- determine the appropriate sequence of development and recommend measures to ensure that problems associated with commercial expansion do not impact the adjoining residential community.

The study begins by defining the existing 1st Avenue retail market function and trade area segments on the basis of questionnaire and interview surveys undertaken with merchants, shoppers, and hospital users. These surveys also assist in identifying effective business improvement programs. Population and retail expenditure projections are then prepared for each 1st Avenue trade area segment for the 1991 to 2006 period. These projections quantify the extent of the potential market growth opportunity represented by each segment. Potential increases in the future market share of 1st Avenue businesses are then evaluated for a set of recommended business improvement initiatives. Finally, these market share assumptions are translated into warranted retail floorspace figures and the land use/zoning implications are identified.

This report is intended to provide a summary of key research findings. Therefore, it does not provide quantitative working data and tables. Copies of the full report, including the results of consumer surveys undertaken during the study, are available for viewing or purchase through The City of Calgary Planning & Building Department library.

Existing Business Mix

The 1st Avenue business area includes businesses which are located on 1st Avenue NE between 7th Street and 9A Street in the Calgary community of Bridgeland-Riverside (see Map 1 and Map 2). The business area contains 14 retail stores and services which provide an estimated 17,900 sq.ft. of retail floorspace. The majority of the area's 46,000 sq.ft. of office floorspace is provided by a pair of 3-storey medical buildings.

Existing retail floorspace on 1st Avenue is highly concentrated in the areas of specialty food/groceries (40%) and Italian restaurants (25%). Drugstores (16%), convenience stores (9%) and personal services (6%) account for most of the remaining floorspace. A florist shop is the only existing store in the durable and semi-durable goods category (3%).

The study area is related to the nearby commercial area located on the 4th Street/ Edmonton Trail major one-way roadway couplet (see Map 2). The 4th Street/Edmonton Trail commercial area provides auto service and furniture businesses that are not found in the 1st Avenue study area. It is expected that the two commercial areas will become increasingly distinct in the future as they respond to different locational opportunities and market segments.

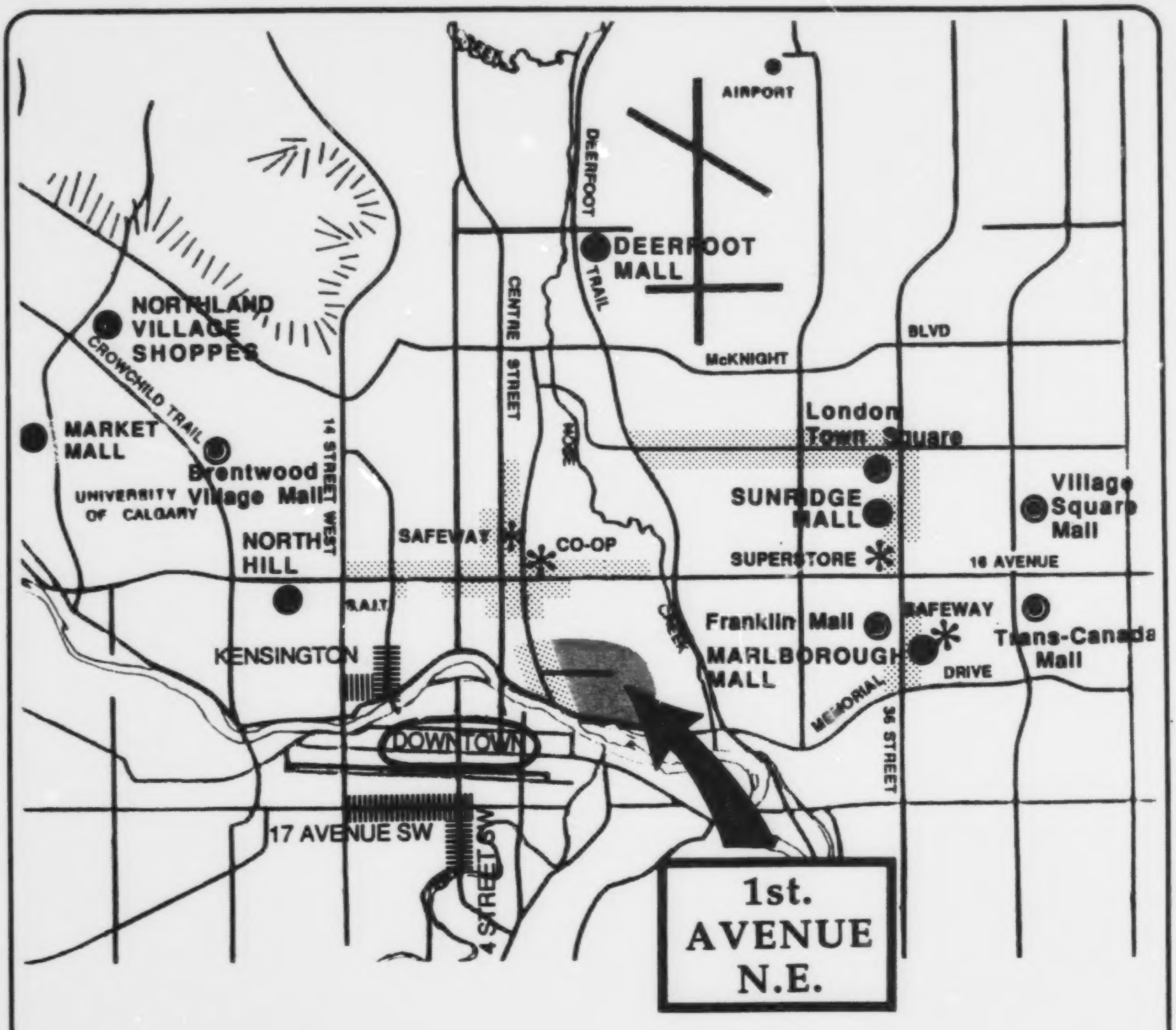
Merchant and Consumer Surveys

Existing 1st Avenue merchants would like to see the following improvements on 1st Avenue (in order of response frequency):

- more/better parking;
- a greater number and variety of businesses;
- physical improvements to public streetscape & storefronts;
- slower traffic for a safer pedestrian environment.

Existing 1st Avenue shoppers like the friendliness, the ethnic flavour, and the Italian stores. Key dislikes include the limited number and variety of stores, the poor condition of storefronts/sidewalks, the lack of coordinated hours of operation among stores, and the high traffic levels on 1st Avenue. Consumers recognize the worn and deteriorated state of the existing public environment and private buildings. The most effective improvements for encouraging this group to shop more often on 1st Avenue include "adding more stores and services" and "a European Village design theme."

Hospital staff and visitors would like to see a greater number and variety of stores and services on 1st Avenue. They currently visit the bakery, food


AIRPORT
DEERFOOT TRAIL
DEERFOOT MALL
NORTHLAND VILLAGE SHOPPES
CROWCHILD TRAIL
MARKET MALL
Brentwood Village Mall
UNIVERSITY OF CALGARY
14 STREET WEST
CENTRE STREET
NOSE
McKNIGHT
BLVD
London Town Square
SUNRIDGE MALL
Village Square Mall
SAFEWAY
CO-OP
SUPERSTORE
16 AVENUE
NORTH HILL
TRAIL
CREEK
Franklin Mall
SAFEWAY
Trans-Canada Mall
KENSINGTON
MARLBOROUGH MALL
MEMORIAL
DRIVE
36 STREET
DOWNTOWN
17 AVENUE SW
4 STREET SW
1st. AVENUE N.E.

▨ BRIDGELAND-RIVERSIDE COMMUNITY

● REGIONAL SHOPPING CENTRE

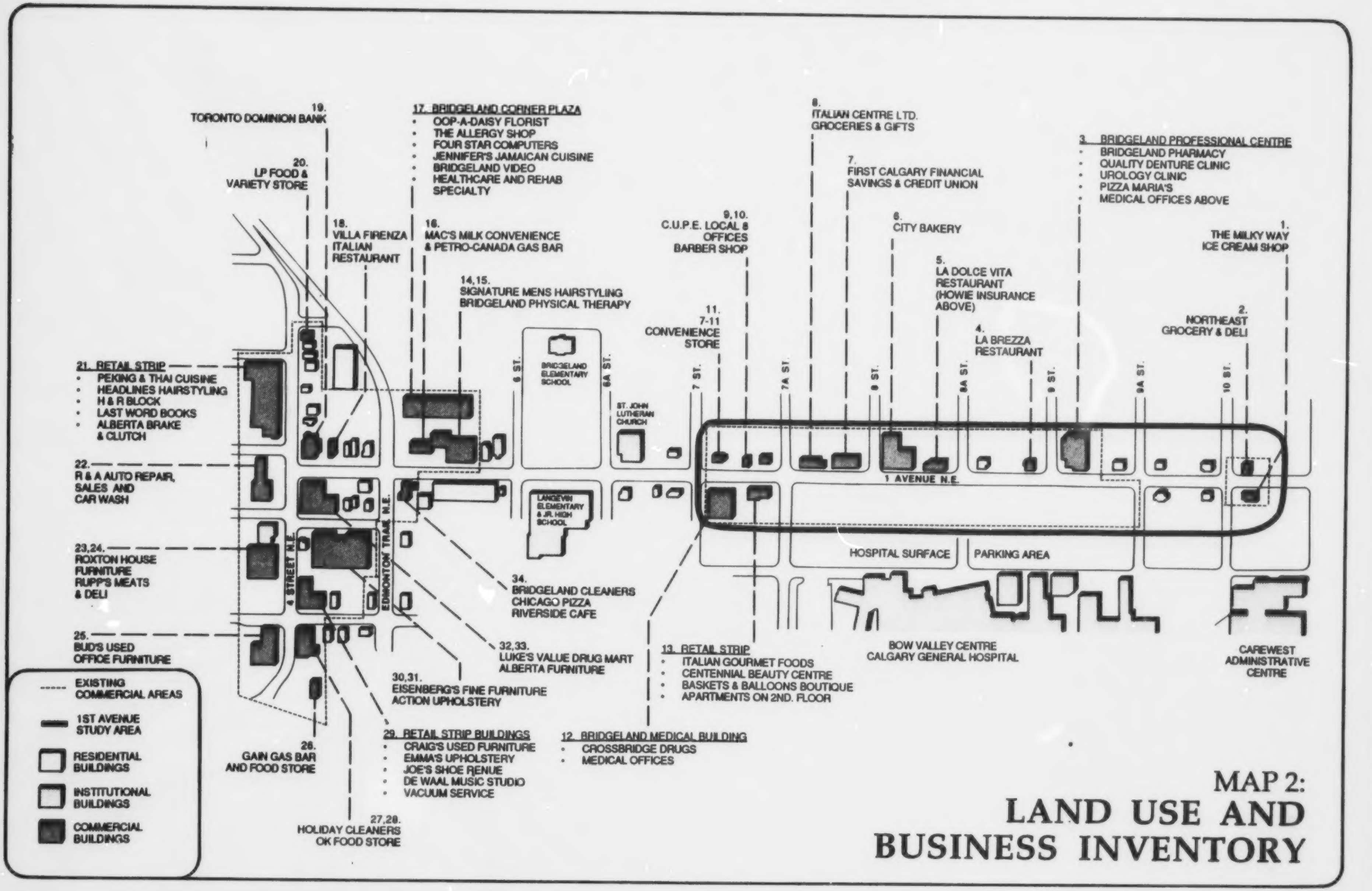
◉ SECTOR/COMMUNITY SHOPPING CENTRE

* COMPETITIVE GROCERY STORES

▥ PEDESTRIAN-ORIENTED STREET RETAIL AREA

░ AUTO-ORIENTED STRIP RETAIL

MAP 1:
LOCATION AND RETAIL CONTEXT


19.
TORONTO DOMINION BANK
20.
LP FOOD & VARIETY STORE
18.
VILLA FIRENZA ITALIAN RESTAURANT
17. BRIDGELAND CORNER PLAZA
• OOP-A-DAISY FLORIST
• THE ALLERGY SHOP
• FOUR STAR COMPUTERS
• JENNIFER'S JAMAICAN CUISINE
• BRIDGELAND VIDEO
• HEALTHCARE AND REHAB SPECIALTY
16.
MAC'S MILK CONVENIENCE & PETRO-CANADA GAS BAR
14,15.
SIGNATURE MENS HAIRSTYLING
BRIDGELAND PHYSICAL THERAPY
11.
7-11
CONVENIENCE STORE
9,10.
C.U.P.E. LOCAL 8 OFFICES
BARBER SHOP
8.
ITALIAN CENTRE LTD.
GROCERIES & GIFTS
7.
FIRST CALGARY FINANCIAL SAVINGS & CREDIT UNION
6.
CITY BAKERY
5.
LA DOLCE VITA RESTAURANT (HOWIE INSURANCE ABOVE)
4.
LA BREZZA RESTAURANT
3. BRIDGELAND PROFESSIONAL CENTRE
• BRIDGELAND PHARMACY
• QUALITY DENTURE CLINIC
• UROLOGY CLINIC
• PIZZA MARIA'S
• MEDICAL OFFICES ABOVE
2.
NORTHEAST GROCERY & DELI
1.
THE MILKY WAY ICE CREAM SHOP
21. RETAIL STRIP
• PEKING & THAI CUISINE
• HEADLINES HAIRSTYLING
• H & R BLOCK
• LAST WORD BOOKS
• ALBERTA BRAKE & CLUTCH
22.
R & A AUTO REPAIR, SALES AND CAR WASH
23,24.
ROXTON HOUSE FURNITURE
RUPP'S MEATS & DELI
25.
BUD'S USED OFFICE FURNITURE
26.
GAIN GAS BAR AND FOOD STORE
27,28.
HOLIDAY CLEANERS
OK FOOD STORE
29. RETAIL STRIP BUILDINGS
• CRAIG'S USED FURNITURE
• EMMA'S UPHOLSTERY
• JOE'S SHOE RENUE
• DE WAAL MUSIC STUDIO
• VACUUM SERVICE
30,31.
EISENBERG'S FINE FURNITURE
ACTION UPHOLSTERY
32,33.
LUKE'S VALUE DRUG MART
ALBERTA FURNITURE
34.
BRIDGELAND CLEANERS
CHICAGO PIZZA
RIVERSIDE CAFE
12. BRIDGELAND MEDICAL BUILDING
• CROSSBRIDGE DRUGS
• MEDICAL OFFICES
13. RETAIL STRIP
• ITALIAN GOURMET FOODS
• CENTENNIAL BEAUTY CENTRE
• BASKETS & BALLOONS BOUTIQUE
• APARTMENTS ON 2ND. FLOOR
BOW VALLEY CENTRE
CALGARY GENERAL HOSPITAL
CAREWEST ADMINISTRATIVE CENTRE
HOSPITAL SURFACE
PARKING AREA
1 AVENUE N.E.
4 STREET N.E.
EDMONTON TRAIL N.E.
6 ST.
6A ST.
7 ST.
7A ST.
8 ST.
8A ST.
9 ST.
9A ST.
10 ST.
BRIDGELAND ELEMENTARY SCHOOL
LANGEVIN ELEMENTARY & JR. HIGH SCHOOL
ST. JOHN LUTHERAN CHURCH
EXISTING COMMERCIAL AREAS
1ST AVENUE STUDY AREA
RESIDENTIAL BUILDINGS
INSTITUTIONAL BUILDINGS
COMMERCIAL BUILDINGS

MAP 2: LAND USE AND BUSINESS INVENTORY

stores and restaurants most frequently. This group rated a "European Village theme" as the most effective improvement for encouraging more frequent shopping, followed closely by "more stores," "more sales and promotions," and "more advertising."

Current Trade Area

The trade area for 1st Avenue businesses (between 7 Street and 9A Street) consists of three distinct segments. These are noted below along with the estimated proportion of total retail sales that is derived from each segment.

1. Bridgeland-Riverside community residents (20-25%)
2. Staff, patients and visitors of Bow Valley Centre hospital and local medical offices (30-35%)
3. Residents of the remaining City-wide trade area (40-45%)

It is clear that the 1st Avenue study area, despite its relatively small level of retail floorspace, serves a City-wide trade area. However, an estimated 50-55% of total sales to study area businesses are from the immediate local area which includes community residents along with users of the Bow Valley Centre hospital and local medical offices. The remaining 40-45% of current sales are to residents of communities that are spread evenly throughout the City of Calgary and beyond.

The trade area varies widely for different types of businesses on 1st Avenue. Specialty food stores, for example, draw 26% of their customers from Bridgeland-Riverside or adjacent neighbourhoods and 64% from throughout the City and beyond. Approximately ten percent of these specialty food customers are linking their shopping with a visit to the hospital. Most drugstore customers are patients visiting the medical offices on 1st Avenue. These patients come from inner communities (30%), other Calgary suburban areas (35%), and directly from the hospital (15%). The customers of grocery/convenience stores and personal services tend to be more locally based where 35% of customers are local residents; 20-30% are linked to the hospital; and 35-45% are from outside the local area.

Market Share and Trade Area Growth Potential

Bridgeland-Riverside Resident Market Segment

The 1991 Bridgeland-Riverside population of 4,813 persons is expected to grow by an average of 1% per year representing a total increase of 771 persons during the next decade. 1st Avenue specialty food, grocery and convenience stores are currently achieving a reasonable share of the local market. This market segment will provide only a moderate potential for future retail floorspace growth on 1st Avenue.

Bow Valley Centre Hospital Market Segment

The Bow Valley Centre hospital has approximately 3,300 employees (full time equivalent staff of 2,500 persons). The hospital also provides beds for 640 in-patients. Accurate counts for the number of "out-patients" and "visitors" are unavailable. For purposes of this study, annual visits to the hospital by out-patients and visitors has been estimated conservatively at 100,000 "visits" per year, based on available parking statistics. Based on an average of 10 repeat visits per year, an estimated 10,000 persons per year will visit the hospital on a "repeat" basis as out-patients or non-patient visitors. Survey results indicate that 19% of hospital staff, 17% of patients, and 5% of visitors shop on 1st Avenue on a regular basis.

During the next decade, trends in health care are expected to result in stable staff levels, fewer in-patients, and significantly greater numbers of out-patients and visitors who accompany out-patients to the hospital. Bow Valley Centre hospital planners expect the number of out-patients/visitors to increase by 10 to 20% per year until current numbers are at least doubled. 1st Avenue businesses currently achieve a low share of the hospital-based market. Growth in the size of this market – along with opportunities for capturing an increased share of this growing market – provides a high potential for retail sales and floorspace growth on 1st Avenue.

The Bow Valley Centre Hospital is currently planning for redevelopment of the physical plant in order to accommodate the increased demand for out-patient services. If changes in Provincial funding priorities were to delay redevelopment, hospital planners believe that the anticipated growth in out-patient services and outpatient visits would occur within the existing facilities. It seems reasonable to expect that the capacity of the existing physical plant would place some constraints on growth in outpatient services. However, it is assumed that any such constraints would have a relatively minor impact on the retail floorspace forecasts contained in this report.

Remaining City-Wide Market Segment

City of Calgary population growth is expected to average as much as 2% per year during the next 10 to 15 years, creating new opportunities for retail growth throughout the City. Dominant trends in the City-wide retail market include the ascendency of large retail "power centres" (including freestanding or grouped discount warehouse stores); the declining strength of enclosed shopping centres and traditional department stores; and the renewed strength of neighbourhood convenience centres. Competition for 1st Avenue businesses in the City-wide market will be from traditional regional shopping centres and street-oriented specialty shopping areas (such as 17th Avenue

SW, Kensington, and the downtown) rather than the large volume discount warehouse stores. The declining popularity of the traditional enclosed shopping centre format may provide new opportunities for street oriented specialty retail areas that provide unique products and a high level of service at reasonable prices. However, given the strength of existing and possible future competitive retail areas throughout the City, the City-wide market provides only a moderately high potential for retail floorspace growth on 1st Avenue.

Summary of 1st Avenue NE Strengths & Weaknesses

STRENGTHS

- service quality and friendliness
- ethnic/European atmosphere
- unique specialty food stores
- Italian restaurants
- Bow Valley Centre hospital
- central location in City
- pedestrian street-orientation

WEAKNESSES

- amount/variety of retail
- lack of continuous frontage
- peak period parking congestion
- poor condition of streetscape
- uncoordinated operating hours
- lack of co-operation among merchants

Recommended Market Orientation

In order to successfully attract new shoppers and retail stores to 1st Avenue NE, a series of business improvement initiatives should be undertaken that are carefully targetted to the available market opportunities. The identification of a preferred "market orientation" for 1st Avenue businesses will assist in selecting improvement programs. A preferred market orientation is determined by examining current market strengths, market growth areas, and existing and future competition. By establishing an agreed-upon "market-orientation" for the 1st Avenue business area, individual businesses can invest in improvements – both individually and potentially as a group – that will support the preferred market orientation and thereby assist in improving overall business conditions.

The recommended market orientation for 1st Avenue is based on the following "two-pronged" approach:

1. Strengthen the existing specialty/ethnic food and restaurant mix that makes 1st Avenue unique and already draws effectively from the City-wide trade area.
2. Increase the range of services and convenience goods that are targetted specifically to the hospital-based market.

This dual market orientation will build on the two main strengths of the current business area: the City-wide market draw of existing specialty food outlets and restaurants; and the presence of a growing major institution on 1st Avenue that draws staff and visitors from throughout the City and southern Alberta.

The City-Wide Market Orientation

Additional specialty food stores and a broader range of restaurants could strengthen the image of 1st Avenue as a permanent, year-round, European, street-oriented, food shopping area. The future market share potential will depend on the ability of 1st Avenue to continue to provide a product to the consumer that is unique and different from the standard forms of retail competition which exist throughout the City. This differentiation will also be necessary to capture a greater share of the growing hospital-based market.

The Hospital-Based Market Orientation

The second component of the recommended dual market orientation provides the largest potential for growth in sales and retail floorspace on 1st Avenue. In order to successfully realize the growth potential from the hospital-based market, a coordinated marketing program will be required (co-ordinated promotions and advertising targetted to hospital users). Hospital users are busy people who have shopping options available closer to their homes. They will need to be made aware of the unique nature of the products, services, and prices on 1st Avenue. Note that the hospital market orientation will also serve to increase the range of goods and services that are available to local residents of Bridgeland-Riverside and employees of other institutions in the immediate area.

The following types of new stores and services can be expected to address the anticipated market opportunity and complement the existing mix of businesses on 1st Avenue.

- Casual restaurants, smaller ethnic restaurants, coffee shops, donut shops will cater to both the hospital-based and the City-wide specialty foods markets.
- Additional specialty food stores including, for example, a butcher shop, health food store, candy and chocolate store, or new European or ethnic specialties will cater to both the hospital-based and the City-wide specialty foods markets.
- Durable and semi-durable goods stores such as culinary arts supplies or a bookstore with specialization in foods/cookbooks, stationery and gift stores, toy and hobby stores, or other ethnic specialty goods will complement the specialty food function of the area and diversify the range of goods offered to the hospital-based market.

- Personal services such as barbers/hairdressers, dry cleaning, post office, or health club, will expand and/or diversify the range of services available to the hospital-based market.

On-street interviews with shoppers and in-hospital interviews with staff, patients and visitors indicate that there is currently a significant demand for new floorspace in the first two categories (casual restaurants and additional specialty foods). On the other hand, growth in personal and other convenience service floorspace would only be warranted following significant growth in the area's specialty food function, or following implementation of a coordinated marketing program to improve the area's current share of the hospital-based market.

Future Retail Floorspace Growth

The initial step in determining the potential for future retail floorspace growth on 1st Avenue was to estimate current sales by 1st Avenue stores. Annual sales per square foot were estimated for specific business types on the basis of merchant questionnaire results, interviews with local merchants, industry norms, and Statistics Canada sources. Secondly, the total dollars spent by local community residents, hospital staff and visitors, and the remaining City-wide population were estimated for the types of retail goods and services that are currently offered on 1st Avenue. By comparing current sales levels with total expenditure from each trade area segment, the current 1st Avenue "market share" was determined for each market segment and for various types of goods and services.

Based on future trade area population growth projections and attitudes of consumers identified through survey research, reasonable future shifts in market share were then examined for each trade area segment given implementation of various business improvement programs.

Three business improvement "programs" were selected to examine the three key variables that could influence the level of floorspace warranted on 1st Avenue in the future: streetscape improvements (public and private); coordinated marketing initiatives; and retail development of the 1st Avenue hospital frontage.

Public streetscape improvements are recommended as the first stage in any business improvement strategy for 1st Avenue. Streetscape improvements will be required for the following reasons:

- to maintain current market share in the face of increasing competition through normal reinvestment, maintenance, and repair of the public environment;
- to provide a more cohesive physical image and strengthened physical identity for the commercial area;
- to provide a base of cooperative revitalization success that will build support for possible follow-up initiatives in marketing and private facade improvement.

The "Low Growth" program assumes that public streetscape improvements are the first and only improvement initiative undertaken on 1st Avenue. No subsequent cooperative initiatives are undertaken and no retail development occurs on the 1st Avenue hospital frontage.

The "Medium Growth" program assumes that public streetscape improvements are supplemented with the following subsequent initiatives:

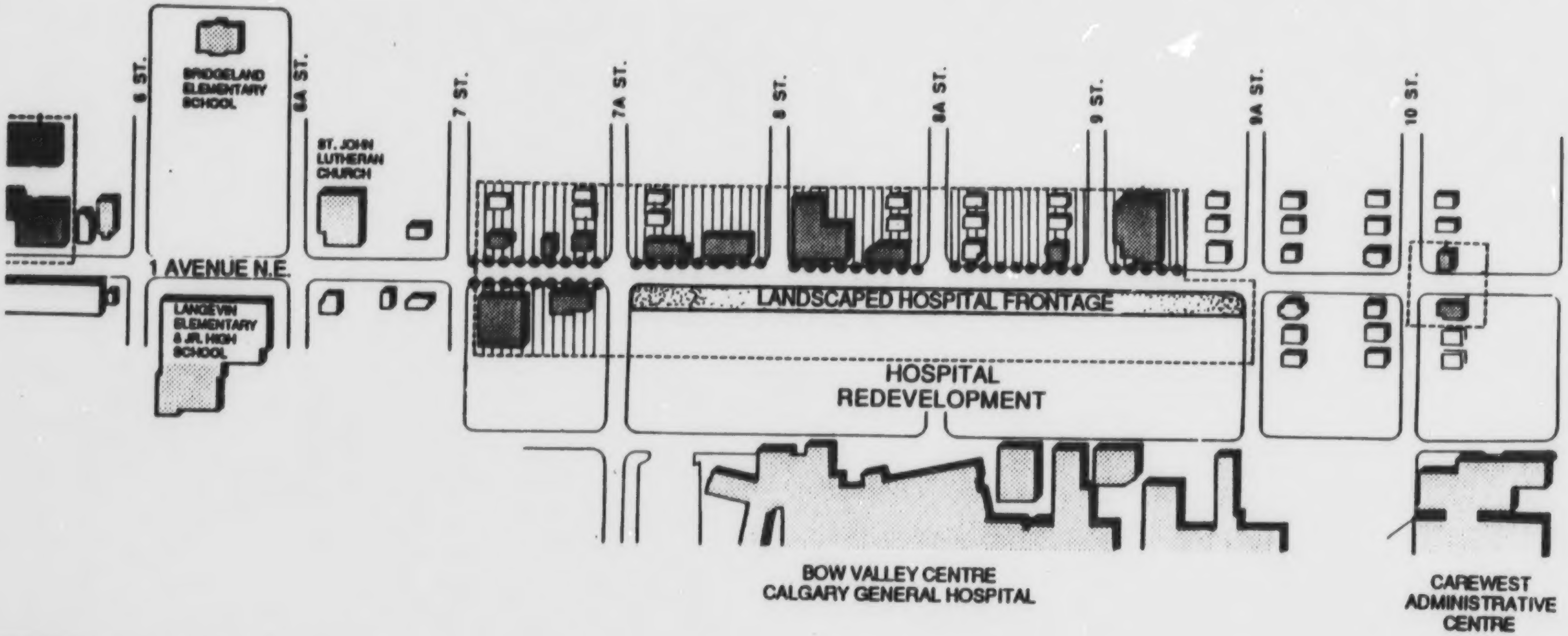
- adoption of an agreed-upon market orientation by the business association;
- formation of a Business Revitalization Zone for purposes of adopting and implementing a coordinated marketing program targetted to the hospital-based market segment; and,
- gradual, ongoing private improvements to facades that are consistent with the European Village design guidelines contained in the Bridgeland-Riverside Area Redevelopment Plan;
- landscaped setback area on the 1st Avenue hospital frontage.

The "High Growth" program is similar in all respects to the Medium Growth program with the exception that a large portion of the 1st Avenue hospital frontage is available for phased at-grade retail development.

Low Growth Program: 6,000 Square Feet of New Retail Floorspace

A "Low Growth" program would undertake only the public streetscape improvements, without proceeding to any subsequent cooperative initiatives. Public streetscape improvements alone could be expected to maintain the existing 1st Avenue share of the local and the hospital-based market. However, the area's share of the growing City-wide market could be expected to decline slightly throughout the study period (although actual sales levels would be maintained) due to increased competition from retail areas throughout the City.

Increases in annual retail sales under the Low Growth program can be expected to warrant development of approximately 6,000 sq.ft. of new retail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9 ST.
9A ST.
10 ST.
1 AVENUE N.E.
LANGEVIN ELEMENTARY & JR. HIGH SCHOOL
LANDSCAPED HOSPITAL FRONTAGE
HOSPITAL REDEVELOPMENT
BOW VALLEY CENTRE
CALGARY GENERAL HOSPITAL
CAREWEST ADMINISTRATIVE CENTRE

- ▥ INFILL & REDEVELOPMENT OF EXISTING COMMERCIAL AREA
- ▨ EXPANSION OF COMMERCIAL AREA
- ▩ HOSPITAL FRONTAGE DEVELOPMENT
- ●●●●●● PUBLIC STREETCAPE IMPROVEMENTS
- --------- EXISTING COMMERCIAL AREA BOUNDARY
- ◌ ULTIMATE FOCUS OF COMMERCIAL AREA

	ANTICIPATED RETAIL FLOORSPACE GROWTH	
TO 1996	3,000 SF	INFILL
1997 - 2001	2,500 SF	INFILL
2002 - 2006	500 SF	INFILL
TOTAL	6,000 SF	

MAP 3:
LOW GROWTH PROGRAM
PUBLIC STREETSCAPE IMPROVEMENTS ONLY

floorspace on 1st Avenue during the next 15 years (ie, 1991 to 2006). By far the largest increase in sales under this program is expected to come from the growing hospital-based market.

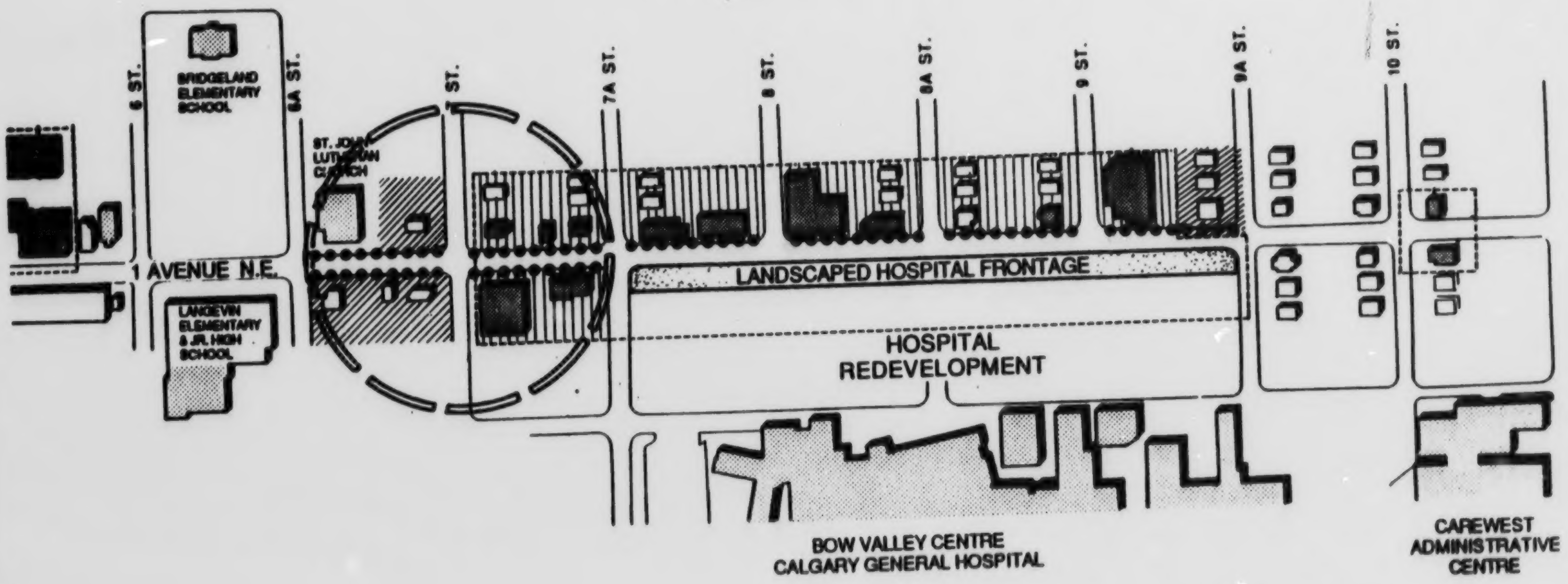
Approximately 3,000 sq.ft. of new retail floorspace would be warranted by 1996. Ideally, this initial increase in floorspace will be accommodated within the existing commercial policy area as defined in the Bridgeland-Riverside Area Redevelopment Plan (ARP). Most of the remaining 3,000 sq.ft. of warranted retail floorspace growth would occur by 2001 in conjunction with growth in the number of hospital visitors and outpatients. It is possible that all 6,000 sq.ft. of new retail floorspace could be accommodated within the existing commercial policy area, assuming that existing underutilized 1st Avenue frontage sites are redeveloped, and assuming that reasonably efficient commercial lot assembly and development patterns are realized (see Map 3). Development of a more compact and continuous retail area should be encouraged.

Under the "Low Growth" program a portion of warranted demand for 6,000 sq.ft. of new retail floorspace could also be accommodated on the 1st Avenue hospital frontage. For example, up to 3,000 sq.ft. of general retail floorspace could be accommodated on the hospital frontage by 2001. This relatively small amount of general or market retail space could be supplemented by locating some of the hospital's internal retail, public, cafeteria, or clinic floorspace on the 1st Avenue frontage. The remaining 3,000 sq.ft. of warranted retail market floorspace would be provided as infill development within the existing commercial area.

Medium Growth Program: 16,000 Square Feet of New Retail Floorspace

Public streetscape improvements should be undertaken as the first stage in a "Medium Growth" business improvement program. Cooperative marketing (advertising and promotion) and physical improvements to private buildings would subsequently build on streetscape improvements to implant a consistent image of 1st Avenue as a unique destination shopping area in the minds of existing and potential customers. The Medium Growth improvement program assumes that the hospital frontage lands are developed as a landscaped setback area and do not become available for commercial development.

The nature of the potential hospital-based market will require coordinated marketing in order to successfully realize the potential for increased sales. Coordination of a portion of the existing advertising budgets of all businesses could have a large impact when targetted to attract the hospital-based market. A secondary emphasis is recommended for coordinated marketing of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▥ INFILL & REDEVELOPMENT OF EXISTING COMMERCIAL AREA

▨ EXPANSION OF COMMERCIAL AREA

▩ HOSPITAL FRONTAGE DEVELOPMENT

●●●●●● PUBLIC STREETCAPE IMPROVEMENTS

---------- EXISTING COMMERCIAL AREA BOUNDARY

◯ ULTIMATE FOCUS OF COMMERCIAL AREA

ANTICIPATED RETAIL FLOORSPACE GROWTH		
BY 1996	8,000 SF	INFILL & EXPANSION
1997 - 2001	6,500 SF	INFILL & EXPANSION
2006	1,500 SF	INFILL & EXPANSION
TOTAL	16,000 SF	

MAP 4:

MEDIUM GROWTH PROGRAM

PUBLIC STREETSCAPE IMPROVEMENT
COORDINATED MARKETING
(NO HOSPITAL FRONTAGE DEVELOPMENT)

specialty food outlets to the City-wide market. A portion of this City-wide advertising can continue to be undertaken independently by the specialty food merchants that most directly benefit.

Under the medium growth option, it is expected that approximately 16,000 sq.ft. of new retail floorspace will be warranted on 1st Avenue during the next 15 years. With implementation of a coordinated marketing program that includes both the primary hospital-based target market and the City-wide target market segment, it is expected that growth in sales will derive predominantly from the hospital-based market (52%). However, a very significant proportion of new sales growth (43%) is also anticipated from the City-wide market segment.

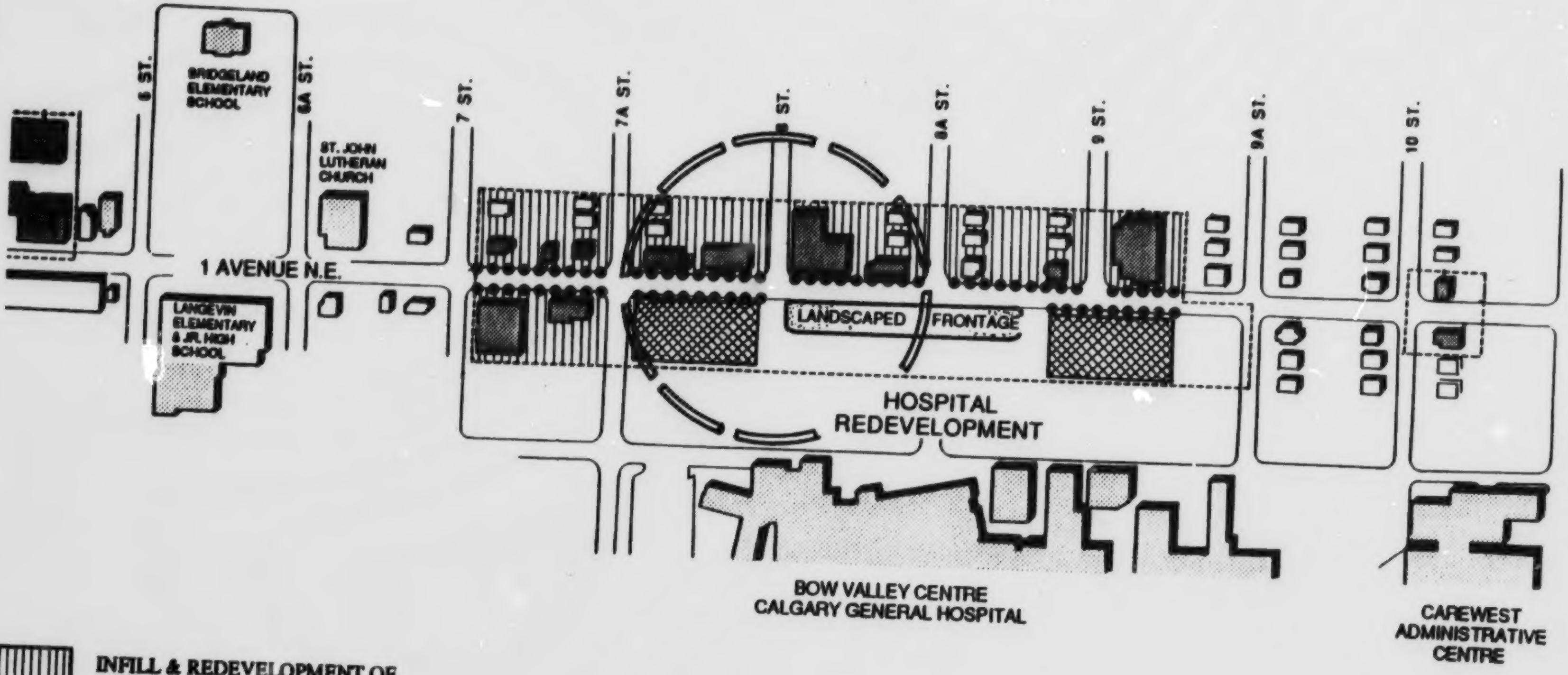
Approximately 8,000 sq.ft. of new retail floorspace could be warranted by 1996 based on streetscape improvements undertaken during 1993 and a coordinated marketing program commencing in 1994. The majority of the remaining floorspace growth would occur between 1996 and 2001 in conjunction with growth in the hospital-based market. Beyond 2001, growth is expected to slow as hospital growth is capped, and as 1st Avenue reaches a competitive threshold relative to other specialty food shopping areas throughout the City.

Under the Medium Growth program, expansion of the commercial policy area (ie, residential to commercial rezoning and Bridgeland-Riverside ARP policy amendment) would be required during the 1992 to 1996 period to accommodate anticipated growth in retail floorspace (see Map 4).

High Growth Program: 20,500 of New Retail Floorspace

The recommended High Growth program illustrates sales growth that could be expected to be achieved by 1st Avenue businesses with implementation of a full package of effective business improvement initiatives. The key difference between the High Growth and the Medium Growth program is the availability of the 1st Avenue hospital frontage lands for at-grade retail development.

Retail development on the 1st Avenue hospital frontage would provide a consolidated central focus of commercial activity on 1st Avenue. It would maximize the potential for efficient shared-use of hospital parking facilities with neighbouring businesses. It would also provide an increased level of service to hospital staff and visitors that would tend to support an increased share of the hospital market for 1st Avenue businesses. Therefore, retail development on the 1st Avenue hospital frontage is not regarded simply as another option for accommodating growth. Rather, it is regarded as a key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▥ INFILL & REDEVELOPMENT OF EXISTING COMMERCIAL AREA

▨ EXPANSION OF COMMERCIAL AREA

▩ HOSPITAL FRONTAGE DEVELOPMENT

●●●●●● PUBLIC STREETCAPE IMPROVEMENTS

--------- EXISTING COMMERCIAL AREA BOUNDARY

◯ ULTIMATE FOCUS OF COMMERCIAL AREA

ANTICIPATED RETAIL FLOORPLACE GROWTH

BY 1996	9,000 SF	INFILL& HOSPITAL
1997 - 2001	9,500 SF	INFILL& HOSPITAL
2002 - 2006	2,000 SF	INFILL & HOSPITAL
TOTAL	20,500 SF	

MAP 5:

HIGH GROWTH PROGRAM

PUBLIC STREETSCAPE IMPROVEMENT
COORDINATED MARKETING
HOSPITAL FRONTAGE DEVELOPMENT

improvement initiative for the 1st Avenue business area which will affect not only the distribution of new floorspace, but also the total amount of warranted floorspace.

Under the High Growth program, approximately 20,500 sq.ft. of new retail floorspace could be warranted on 1st Avenue during the next 15 years. New sales growth would derive from the hospital-based and the City-wide target market segments in similar proportions to the Medium Growth program (52% and 43% respectively).

For purposes of this report, it was assumed that 10,000 - 15,000 sq.ft. of retail floorspace could be accommodated on the hospital frontage. This amount of floorspace should still allow a large portion of the hospital frontage on 1st Avenue to be landscaped as open space (see Map 5).

Approximately 9,000 sq.ft. of new retail floorspace can be expected to be warranted on 1st Avenue by 1996, assuming that at least 5,000 sq.ft. of this floorspace is provided on the 1st Avenue hospital frontage during this period. Alternatively, up to approximately 9,000 sq.ft. of pure retail floorspace could be accommodated on the hospital frontage by 1996 if no allowance is provided for infilling of the existing commercial area during this period. The initial stage of hospital frontage development should occur at the northwest corner of the hospital site in order to reinforce the traditional retail focus of the 1st Avenue business area. The remaining 11,500 sq.ft. of retail floorspace on the 1st Avenue hospital frontage would be warranted during the 1996 -2006 period.

Depending on the timing and amount of retail floorspace that is actually provided on the 1st Avenue hospital frontage, some minor expansion of the existing ARP commercial policy area could be required. It is reasonable to expect that floorspace growth will stabilize after 2001 as hospital growth stabilizes and the competitive potential of 1st Avenue's specialty function within the City-wide marketplace is achieved.

Table 1:

SUMMARY OF WARRANTED RETAIL FLOORSPACE FOR LOW, MEDIUM, AND HIGH GROWTH BUSINESS IMPROVEMENT PROGRAMS

LOW GROWTH PROGRAM

Public Streetscape Improvements Only (1993)

	1992 TO 1996	1997 TO 2001	2002 TO 2006
Existing Retail Floorspace: (sq.ft.)	17,900	17,900	17,900
New Retail Floorspace: (sq.ft.)	3,000	5,500	6,000
Total Retail Floorspace: (sq.ft.)	20,900	23,400	23,900
Distribution of New Space:	*infill development*	*infill or possible minor expansion of commercial area*	

MEDIUM GROWTH PROGRAM

Public Streetscape Improvements (1993)

Cooperative Marketing Via BRZ Organization (1994)

	1992 TO 1996	1997 TO 2001	2002 TO 2006
Existing Retail Floorspace: (sq.ft.)	17,900	17,900	17,900
New Retail Floorspace: (sq.ft.)	8,000	14,500	16,000
Total Retail Floorspace: (sq.ft.)	25,900	32,400	33,900
Distribution of New Space:	*infill & minor expansion*	*significant expansion of commercial area*	

HIGH GROWTH PROGRAM

Public Streetscape Improvements (1993)

Cooperative Marketing Through BRZ Organization (1994)

Retail Development On 1st Avenue Hospital Frontage Lands (1995-96)

	1992 TO 1996	1997 TO 2001	2002 TO 2006
Existing Retail Floorspace: (sq.ft.)	17,900	17,900	17,900
New Retail Floorspace: (sq.ft.)	9,000	18,500	20,500
Total Retail Floorspace: (sq.ft.)	26,900	36,400	38,400
Distribution of New Space:	*infill & hospital frontage development*	*hospital frontage development and minor expansion or infill of commercial area*	

Table 2:
PHASING AND DISTRIBUTION SCENARIO FOR NEW RETAIL FLOORSPACE: HIGH GROWTH PROGRAM

YEAR	ACTION	NEW FLOORSPACE SQ.FT.	CUMULATIVE FLOORSPACE SQ.FT.	LOCATION OF NEW SPACE (1)
1991 1992	ARP and Market Study	1,500	1,500	Infill
1993	Public Streetscape Improvements	1,500	3,000	Infill
1994	BRZ and Coordinated Advertising	2,000	5,000	Hospital Frontage
1995	Parking and Private Facade Improvements	2,000	7,000	Hospital Frontage
1996	Hospital Frontage Development	2,000	9,000	Hospital Frontage
1997 - 2001	Promotions and Cordination Store Hours	9,500	18,500	Hospital Frontage and Infill
2002-2006	Ongoing	2,000	20,500	Infill

Note 1. "Location" for purposes of this table refers to the location which minimizes the need for expansion into the existing residential policy area and which creates the most compact, focused and continuous retail area. It is assumed that the hospital frontage would accommodate up to 15,000 sq. ft. of retail floorspace.

Other Findings and Recommendations

Recommended Business Area Improvement Program
The "High Growth" program as outlined in this report is a realistic improvement strategy for 1st Avenue that has benefits for existing merchants and medical offices within the study area, the Bow Valley Centre hospital, other institutions in the area, and existing Bridgeland-Riverside residents. Key elements of a High Growth business improvement program for 1st Avenue should include the following:

1. moderate-cost public streetscape improvements
2. Business Revitalization Zone designation
3. development of retail floorspace on 1st Avenue hospital frontage
4. coordinated and consistent advertising program (hospital users and specialty foods)
5. targetted promotions and sales events (hospital users and specialty foods)
6. implementation of private improvements which reinforce the European Village streetscape theme
7. shared use parking management and signage
8. some coordination of operating hours

Development of street-oriented retail floorspace on the hospital frontage will be required to achieve the full potential of the commercial area. Any number of hospital-based clinical, research and/or administration functions could be located on the upper level (or part of the main level) of this street-front space in addition to market commercial activities. Landscaped open space on the hospital frontage will contribute to the function of the commercial area and to the Bridgeland-Riverside neighbourhood if it is relatively compact and surrounded by hospital and commercial activity-generating uses.

Zoning and Land Use
The existing C-1 Local Commercial District will provide for an appropriate intensity of streetfront retail development on 1st Avenue. However, new uses on 1st Avenue should not be restricted to local or convenience retail uses. Major expansion of the ARP commercial policy area could be required under the Medium Growth program outlined in this report. Minor expansion of the existing commercial policy area may be required under any of the three growth programs if lots cannot be consolidated for reasonably efficient commercial development.

In order to ensure continued reinforcement of the existing character and function of the commercial area, all new commercial development should front onto 1st Avenue and surface parking should generally be located to the rear or side of commercial buildings. Within the designated commercial area, efficient parcel consolidation and development should be encouraged in order to minimize the ultimate need for expansion of the commercial area. In order to facilitate the efficient conversion from residential to commercial use, consideration could be given to permitting certain transitional uses on parcels that front onto side streets within the commercial policy area. Such uses could include home occupations/offices in existing dwellings, and well-landscaped surface parking areas.

Office Development

Any significant demand for office floorspace on 1st Avenue will be for medical offices associated directly or indirectly with the Bow Valley Centre hospital. In the medium to longer term (5-15 years) there is likely to be demand for at least 20,000 sq.ft. of medical office floorspace.

Anticipated demand for new medical office floorspace on 1st Avenue may require a relatively large commercial building comparable to existing 3-storey medical office buildings on 1st Avenue. The need for associated medical services to cluster, the need for elevator access to upper floors for patients, the need for close proximity to the hospital, and the need to compete with existing medical buildings, will drive the market for medical office space. These needs can best be met by a relatively large, elevator-serviced building with underground parking. Any rezoning to accommodate a medical office building should ensure that continuous retail floorspace is provided at street level frontages.

One option for the provision of a new medical office building on 1st Avenue would be construction of a "cooperative" building on the hospital frontage land. A cooperative building – similar to the existing Bridgeland Medical Building at the corner of 1st Avenue and 7th Street – would be owned and operated by doctors, many of whom would operate their own practice from the building. This type of doctors' cooperative could be pre-sold and designed specifically to suit tenant requirements, thereby minimizing the risk that is often associated with speculative office development.

Residential Development

The upper floors of commercial buildings on 1st Avenue may accommodate a limited demand for general office space (law firms, insurance, etc) and/or commercial recreation, health and education facilities. Alternatively, upper floors could accommodate residential units designed for single person households and hospital employees. Demand for new residential units over stores has not been tested in Calgary. However, many of the characteristics of 1st Avenue NE such as proximity to downtown, proximity to a major employment generator, proximity to stores and services, proximity to transit, and location on a commercial road with reasonably slow/safe/quiet traffic

levels, appear to be suited to the development of reasonably affordable, small housing units over stores.

Traffic Implications

The addition of approximately 20,000 sq.ft. of new retail floorspace over 10 to 15 years can be expected to add approximately 700 vehicle trips per day to existing traffic levels on 1st Avenue (after deducting for shopping/hospital linked trips). This represents an increase of 6% over existing 1st Avenue traffic levels of approximately 11,000 vehicles per day in the vicinity of the hospital. Future growth in hospital traffic will be dispersed relatively evenly throughout the day. Therefore, traffic levels on 1st Avenue can be expected to remain well within the physical capacity of the roadway. Closure of residential roadways adjacent to 1st Avenue should not be required in order to restrict non-residential through-traffic.

Parking On 1st Avenue NE

Existing parking on 1st Avenue is near capacity. Parking is adequate throughout most of the day but becomes inconvenient for customers of local businesses during the noon hour peak period. Therefore, existing by-law parking requirements should be enforced for new retail and specialty food stores.

Restaurants should be permitted to provide a proportion of their parking requirement off-site. In addition, a relaxation of current parking stall requirements should be permitted for small restaurants that will draw a high proportion of their mid-day trade from the hospital, other institutions in the area, or the general pedestrian traffic in the area. Existing restaurants draw the majority of their customers during the supper and evening hours. The Bow Valley Centre has excess parking capacity during the late afternoon and evening hours that can be shared with local restaurants. The hospital is prepared to work with area businesses to ensure convenient availability of excess hospital stalls during these periods.

Business Revitalization Zone

Formation of a Business Revitalization Zone is recommended if 1st Avenue businesses choose to proceed beyond the Low Growth program (basic public streetscape improvements) toward any program which seeks an increased share of the growing hospital-based retail market potential. A Business Revitalization Zone (BRZ) designation would allow funds to be collected by the City from all businesses located within the business area. These member businesses should include medical offices and the Bow Valley Centre hospital. These funds would then be transferred to an elected BRZ Board of Directors for use in support of BRZ marketing and other cooperative programs. The key to success in these programs will be the BRZ's ability to coordinate individual business efforts, rather than the size of the BRZ budget.

In the consultant's opinion, it is unlikely that coordinated and consistent marketing to the hospital-based market segment can occur in the absence of a BRZ type of organizational structure.

City of Calgary Role

The City of Calgary has a significant stake in the preservation and enhancement of older commercial areas. This market study confirms that 1st Avenue provides a small but solid existing economic base and retail function within the City. Growth and revitalization of the 1st Avenue business area will support growth in inner-city property and building assessment values. It will complement and enhance the Bridgeland-Riverside neighbourhood. It has the potential to provide a unique urban environment which integrates specialty food shopping and ethnic restaurants with a major City and regional institution – the Bow Valley Centre hospital.

Given the limited number of existing businesses on 1st Avenue and their corresponding lack of organizational resources, The City of Calgary should continue to provide organizational and planning support to the 1st Avenue Business Association as it pursues specific business improvement initiatives which might include the formation of a BRZ organization. It is not expected that 1st Avenue BRZ budgets would permit the hiring of regular support staff. Therefore, formal support provided by City staff (facilitation, secretarial, general support and advice on precedents and options) would be invaluable until the business group can operate independently.

While the City can provide organizational support and assistance, the momentum for improvement action must be generated and sustained from within the business community itself. The business association should also continue its ongoing dialogue with both the Bow Valley Centre hospital and the Bridgeland-Riverside community. Most – if not all – successful street retailing areas maintain a close cooperative relationship with their local market base. This local market segment is a key to long-term stability since it is not as subject to changing City-wide retail trends and competitive forces as other market segments.

1ST AVENUE NE
RETAIL MARKET STUDY

prepared for:
THE 1ST AVENUE NE BUSINESS ASSOCIATION &
THE CITY OF CALGARY PLANNING & BUILDING DEPARTMENT

prepared by:
WALKER BROWN URBAN CONSULTANTS LTD.

AUGUST 1992

A174/207

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1.0 INTRODUCTION

1.1 Background

Walker Brown Urban Consultants Ltd. has been retained by the City of Calgary and the 1st Avenue NE Business Association to prepare a retail market study for the 1st Avenue NE retail area. Direction to undertake this market study arose when the City Planning & Building Department was given a mandate by City Council "to upgrade" the 1st Avenue NE business area as part of a review of the Bridgeland-Riverside Area Redevelopment Plan (ARP).

Policies contained in the Bridgeland-Riverside ARP establish the 1st Avenue NE commercial area as a "special character area." The ARP defines a commercial policy area boundary and establishes design guidelines for new commercial development on 1st Avenue. The plan further recommends that a public streetscape improvement program be undertaken.

During the neighbourhood planning process, numerous concerns have arisen regarding the function and future role of the 1st Avenue NE commercial area within the community. This market study is intended to address many of these issues.

1.2 Terms of Reference

The terms of reference or objectives for the study can be summarized as follows:

- determine the existing market base and the most appropriate future role (local, regional, etc) for businesses on 1st Avenue;
- determine the types of retail uses and the total retail floorspace potential along 1st Avenue;
- examine the potential role of the hospital frontage on the south side of 1st Avenue in terms of accommodating future retail development;
- recommend appropriate marketing strategies to achieve the retail potential of the area; and
- determine the appropriate sequence of development and recommend measures to ensure that problems associated with commercial expansion do not impact the adjoining residential community.

1.3 Report Organization

This Technical Report is intended to supplement the "1st Avenue NE Market Study Summary Report" which is available under separate cover. The Summary Report contains a concise review of major findings and recommendations. This Technical Report provides the results of survey research undertaken during the study along with relevant background information and tabular data.

The report begins in Section 2.0 with an inventory and brief review of the existing business mix on 1st Avenue and the nearby Edmonton Trail commercial strip. This section also summarizes results of a questionnaire survey of businesses in the study area.

Section 3.0 provides a summary of results of consumer research surveys undertaken during the market study. These included 106 random on-street shopper interviews; 201 interviews with shoppers at specialty food stores on 1st Avenue; and 116 interviews with hospital staff, visitors and patients in the Bow Valley Centre hospital. Detailed tabular results of all consumer surveys are presented in the Appendices to this report.

Section 4.0 provides an analysis of 1st Avenue market potential. This section reviews competitive strengths/weaknesses of 1st Avenue and trade area growth projections. Based on these findings and results of the survey research, a preferred market orientation and specific preferred new commercial uses are identified. Three alternative "programs" (or levels of investment) are examined in terms of their effectiveness for increasing market share and sales to 1st Avenue businesses. Total warranted retail floorspace estimates are prepared for each "program" for the 15 year period from 1991 to 2006. Conceptual plans are included in the report which illustrate the options for accommodating new retail floorspace within and/or beyond the existing commercial policy zone.

2.0 THE COMMERCIAL AREA

2.1 Location

The 1st Avenue NE commercial area is located in the inner-city community of Bridgeland-Riverside, approximately one mile northeast from the heart of the Calgary downtown commercial core (see Map 1). In addition to the residential neighbourhood of Bridgeland-Riverside, the local context includes a number of senior citizens residences and institutional uses such as a school for handicapped students, the Crossbow Auxiliary Hospital (Carewest) and the Bow Valley Centre Hospital.

For purposes of this report the 1st Avenue study area is bounded by 7 Street and the laneway to the east of 10th Street NE. Within this 6 1/2 block study area a mix of commercial, residential, and hospital land uses front on 1st Avenue. Surface parking for the Bow Valley Centre Hospital accounts for 4 blocks of study area frontage (see Map 2).

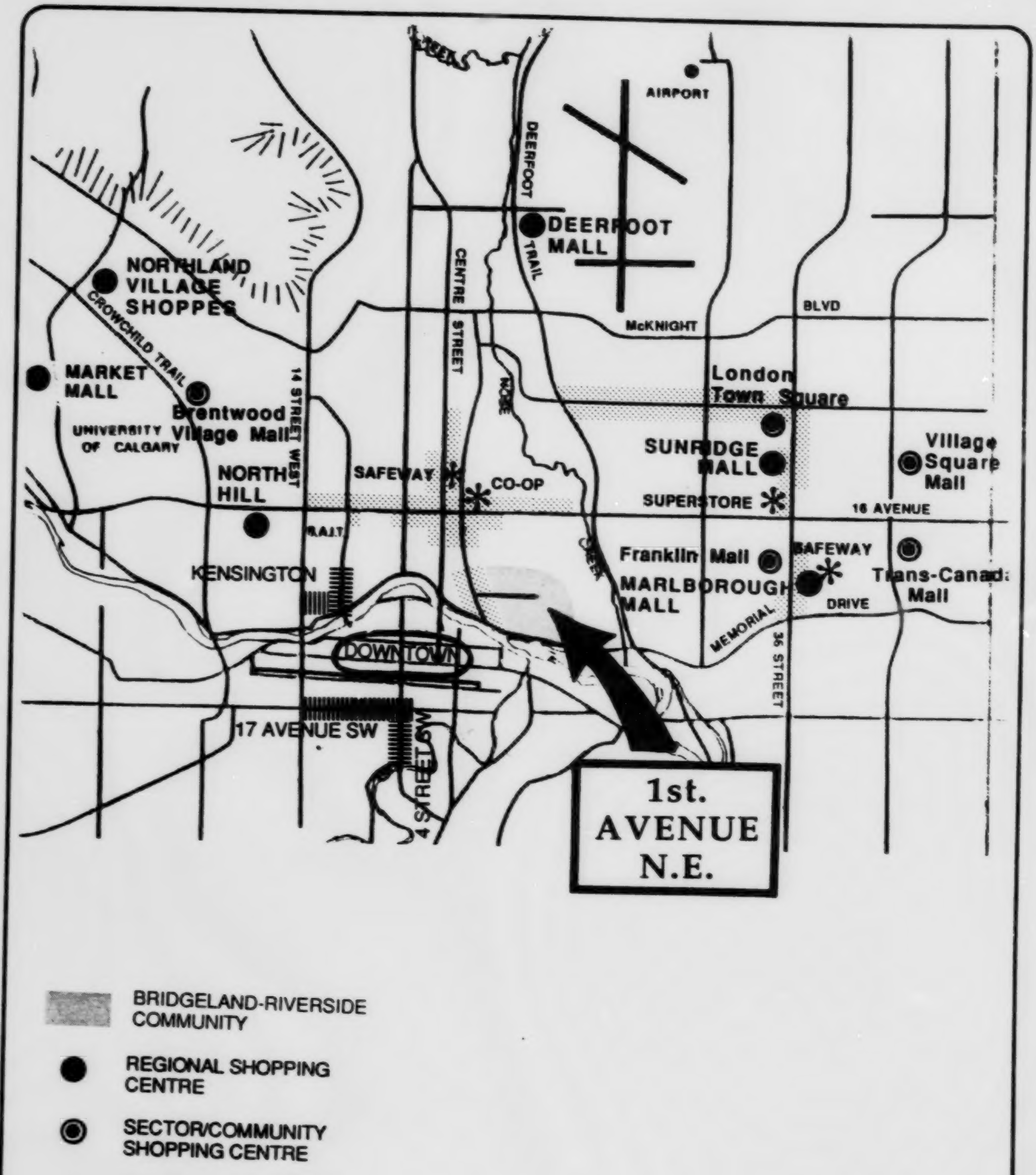
The "Edmonton Trail" automobile-oriented commercial area is located immediately east of the study area on the 4th Street and Edmonton Trail NE major one-way roadway couplet (see Map 2). The Edmonton Trail commercial area provides auto service and furniture businesses that are not found in the 1st Avenue study area. It is expected that the 1st Avenue and the Edmonton Trail commercial areas will serve increasingly distinct retail functions in the future as they respond to different locational opportunities and market segments.

2.2 Existing Business Mix

The 1st Avenue business area contains 18 streetfront businesses providing a total of 24,000 sq. ft. of commercial floorspace. A detailed inventory of all businesses located on 1st Avenue is provided in Table 1 and Map 2. Four of the existing commercial storefronts can be considered "non-retail" (offices, a medical clinic and a bank). The remaining 14 storefronts contain retail stores and services which provide an estimated 17,900 sq. ft. of floorspace.

A total retail floorspace inventory of 17,900 sq. ft. represents a very small retail strip within the City-wide retailing system. A modern "neighbourhood" shopping centre, for example generally provides over 50,000 sq. ft. of retail floorspace to serve local residents. A small "neighbourhood" centre would provide 30,000 sq. ft. of floorspace.

Table 2 summarizes the existing business mix for both the 1st Avenue NE study area and the nearby Edmonton Trail commercial area. Existing retail


AIRPORT
DEERFOOT TRAIL
DEERFOOT MALL
NORTHLAND VILLAGE SHOPPES
CROWCHILD TRAIL
McKNIGHT
BLVD
CENTRE STREET
14 STREET WEST
MARKET MALL
Brentwood Village Mall
UNIVERSITY OF CALGARY
London Town Square
SUNRIDGE MALL
Village Square Mall
NOSE
NORTH HILL
SAFEWAY
CO-OP
SUPERSTORE
16 AVENUE
S.A.I.T.
KENSINGTON
Franklin Mall
SAFEWAY
CREEK
MARLBOROUGH MALL
Trans-Canada Mall
MEMORIAL
DRIVE
36 STREET
DOWNTOWN
17 AVENUE SW
4 STREET SW
1st. AVENUE N.E.

▨ BRIDGELAND-RIVERSIDE COMMUNITY

● REGIONAL SHOPPING CENTRE

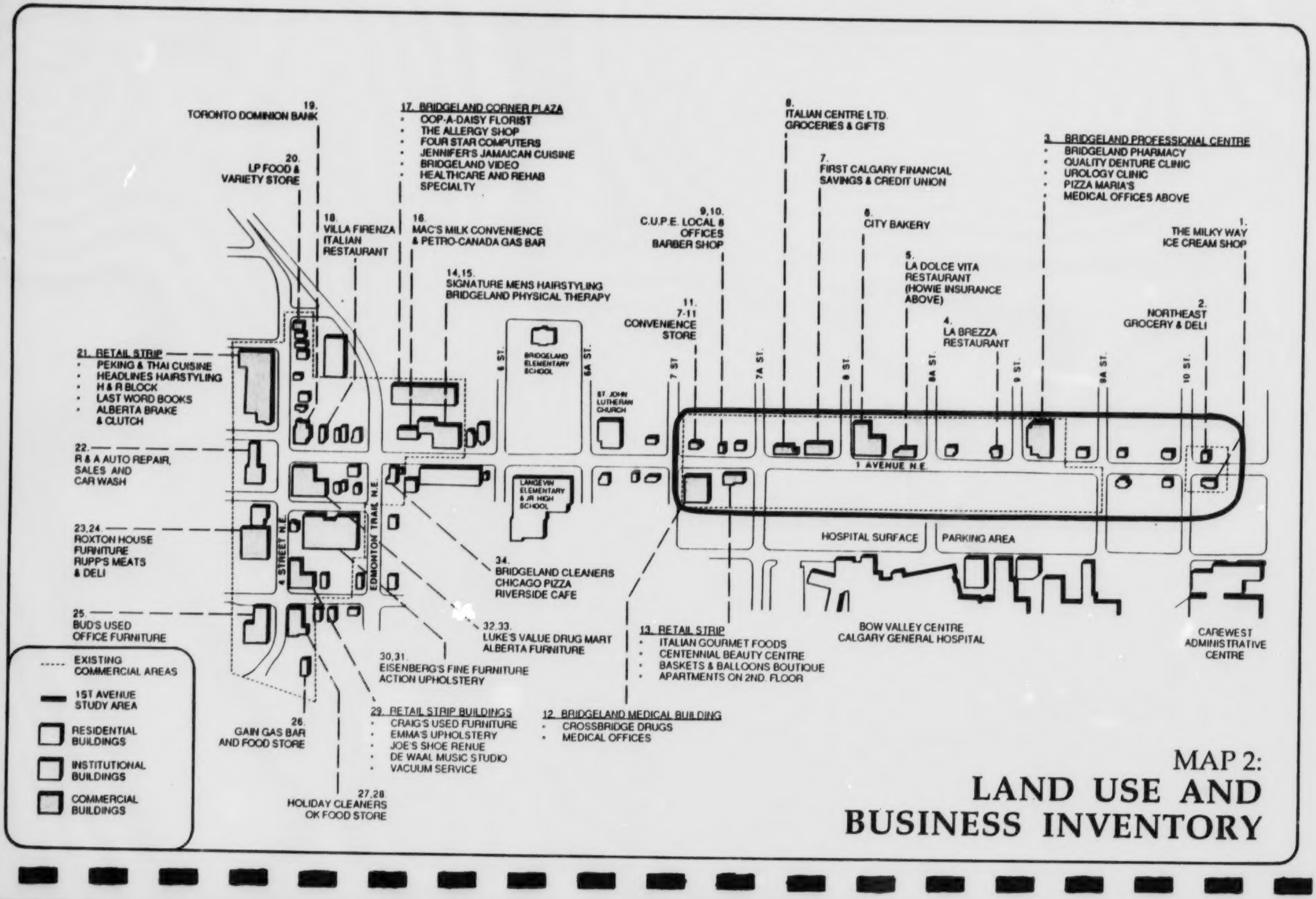
◉ SECTOR/COMMUNITY SHOPPING CENTRE

* COMPETITIVE GROCERY STORES

▥ PEDESTRIAN-ORIENTED STREET RETAIL AREA

░ AUTO-ORIENTED STRIP RETAIL

MAP 1:
LOCATION AND
RETAIL CONTEXT



MAP 2: LAND USE AND BUSINESS INVENTORY

19. TORONTO DOMINION BANK
20. LP FOOD & VARIETY STORE
17. BRIDGELAND CORNER PLAZA
• OOP-A-DAISY FLORIST
• THE ALLERGY SHOP
• FOUR STAR COMPUTERS
• JENNIFER'S JAMAICAN CUISINE
• BRIDGELAND VIDEO
• HEALTHCARE AND REHAB SPECIALTY
18. VILLA FIRENZA ITALIAN RESTAURANT
16. MAC'S MILK CONVENIENCE & PETRO-CANADA GAS BAR
14,15. SIGNATURE MENS HAIRSTYLING BRIDGELAND PHYSICAL THERAPY
8. ITALIAN CENTRE LTD. GROCERIES & GIFTS
7. FIRST CALGARY FINANCIAL SAVINGS & CREDIT UNION
3. BRIDGELAND PROFESSIONAL CENTRE
• BRIDGELAND PHARMACY
• QUALITY DENTURE CLINIC
• UROLOGY CLINIC
• PIZZA MARIA'S
• MEDICAL OFFICES ABOVE
9,10. C.U.P.E. LOCAL 8 OFFICES BARBER SHOP
6. CITY BAKERY
1. THE MILKY WAY ICE CREAM SHOP
5. LA DOLCE VITA RESTAURANT (HOWIE INSURANCE ABOVE)
11. 7-11 CONVENIENCE STORE
4. LA BREZZA RESTAURANT
2. NORTHEAST GROCERY & DELI
21. RETAIL STRIP
• PEKING & THAI CUISINE
• HEADLINES HAIRSTYLING
• H & R BLOCK
• LAST WORD BOOKS
• ALBERTA BRAKE & CLUTCH
22. R & A AUTO REPAIR, SALES AND CAR WASH
23,24. ROXTON HOUSE FURNITURE RUPP'S MEATS & DELI
25. BUD'S USED OFFICE FURNITURE
6 ST.
6A ST.
7 ST.
7A ST.
8 ST.
8A ST.
9 ST.
9A ST.
10 ST.
BRIDGELAND ELEMENTARY SCHOOL
ST. JOHN LUTHERAN CHURCH
LANGEVIN ELEMENTARY & JR HIGH SCHOOL
1 AVENUE N.E.
4 STREET N.E.
EDMONTON TRAIL N.E.
HOSPITAL SURFACE
PARKING AREA
BOW VALLEY CENTRE CALGARY GENERAL HOSPITAL
CAREWEST ADMINISTRATIVE CENTRE
34. BRIDGELAND CLEANERS CHICAGO PIZZA RIVERSIDE CAFE
32,33. LUKE'S VALUE DRUG MART ALBERTA FURNITURE
30,31. EISENBERG'S FINE FURNITURE ACTION UPHOLSTERY
13. RETAIL STRIP
• ITALIAN GOURMET FOODS
• CENTENNIAL BEAUTY CENTRE
• BASKETS & BALLOONS BOUTIQUE
• APARTMENTS ON 2ND. FLOOR
29. RETAIL STRIP BUILDINGS
• CRAIG'S USED FURNITURE
• EMMA'S UPHOLSTERY
• JOE'S SHOE RENUE
• DE WAAL MUSIC STUDIO
• VACUUM SERVICE
12. BRIDGELAND MEDICAL BUILDING
• CROSSBRIDGE DRUGS
• MEDICAL OFFICES
26. GAIN GAS BAR AND FOOD STORE
27,28. HOLIDAY CLEANERS OK FOOD STORE
EXISTING COMMERCIAL AREAS
1ST AVENUE STUDY AREA
RESIDENTIAL BUILDINGS
INSTITUTIONAL BUILDINGS
COMMERCIAL BUILDINGS

Table 1:

1st AVENUE NE and EDMONTON TRAIL/4th STREET RETAIL INVENTORY

MAP KEY	BUILDING / BUSINESS NAME & ADDRESS	SPACE (Est. Sq.Ft.)	TYPE	NOTES
	1st AVENUE BUSINESS AREA			
1	The Milky Way	1,200	restaurant	seasonal ice-cream parlour on-street parking
2	North East Grocery & Deli 1104 -1st Ave NE	2,200	Grocery & Convenience	food, convenience & hardware on-street parking
3	Bridgeland Profess. Centre 1010 - 1 Ave NE			3-storey, 20,000 sq.ft. medical office building with retail at grade and U/G parking
	Bridgeland Pharmacy	1,600	drugstore	
	Quality Denture Clinic	1,000	office	
	Urology Clinic	1,200	office	
	Pizza Maria's	1,000	restaurant	
4	La Brezza Restaurant 990 - 9th Street NE	1,200	restaurant	restaraunt in converted house surface parking in rear
5	La Dolce Vita Restaurant 916 - 1 Avenue NE	1,200	restaurant	restaurant with 1200 sq. ft. insurance office above
6	City Bakery 906 - 1st Avenue NE	800	specialty food	floorspace shown includes net retail floor area only
7	First Calgary Financial Savings & Credit Union Ltd. 830 -1st Avenue NE	3,000	financial service	2-storey financial services with admin. offices above, surface parking in rear
8	Italian Centre Ltd 824 - 1st Avenue NE	3,000	grocery & convenience	Italian food and groceries
9	C.U.P.E. Local 8 203 - 7A St. NE	900	office	offices in converted house
10	Barber Shop	500	personal service	
11	7-Eleven Convenience Store	1,600	grocery & convenience	
12	Bridgeland Medical Bldg 803 - 1st Avenue NE			3-storey, 20,000 sq.ft. medical office building with retail drug store at-grade, U/G parking
	Cross Bridge Drugs	1,200	drugstore	

13	Retail Strip Buildings			2-storey buildings with office space & apartments above
	809 - 813, 1st Avenue NE			
	Italian Gourmet Foods	1,200	specialty food	
	Centennial Beauty Centre	600	personal service	
	Baskets & Blooms Boutique	600	semi-durable goods	

TOTAL RETAIL BUSINESSES: 18
TOTAL OCCUPIED SPACE (SQ. FT.): 24,000
TOTAL VACANT SPACE (SQ.FT.): 0

EDMONTON TRAIL/4TH STREET COUPLET BUSINESS AREA

14	Bridgeland Physical Therapy			
	646 - 1st Avenue NE			
	Bridg'd Physical Therapy	1,500	office	2 - storey older building with apartments above
	Vacant Space	750	–	
	Vacant Space	1,000	–	
15	Signature Men's Hair	600	personal service	
	642 - 1st Avenue NE			
16	Mac's Milk Convenience Store	1,200	grocery & convenience	
	& Petro-Can. Gas Station	800	automobile services	
	630 - 1st Avenue NE			
17	Bridgeland Corner Plaza			plaza site integrated with Mac's Milk and Petro-Canada
	630 - 1st Avenue NE			
	Oops-A-Daisy Florist	1,200	semi-durable	
	The Allergy Shop	600	specialty food	
	Four Star Computers	900	durable goods	
	Jennifers Jamaican Cuisine	900	restaurant	
	Bridgeland Video	1,200	semi-durable	
	Health/Rehab Specialty	2,400	durable goods	
	Vacant	900	–	
18	Villa Firenza Italian Restaur't	1,500	restaurant	restaurant in recently converted house
	610 - 1st Avenue NE			
19	Toronto Dominion Bank	2,000	financial service	
	204 - 4th Street NE			
20	LP Food & Variety	1,000	grocery & convenience	groceries & convenience goods
21	Retail Strip			retail strip building with apartments above
	203 - 217, 4th Street NE			
	Peking & Thai Cuisine	650	restaurant	
	Headlines Hair Salon	750	personal service	
	H&R Block Income Tax	500	financial service	
	The Last Word Bookstore	750	semi-durable goods	
	Alberta Brake & Clutch	2,500	automobile services	

22	R & A Auto Repair & Car Wash 103 - 4th Street NE	2,000	auto service	floorspace includes new car sales showroom and auto repair services
23	Roxton House Furniture 39 - 4th Street NE	4,000	furniture	
24	Rupp's Meats & Deli 37 - 4th Street NE	2,000	specialty food	
25	Bud's Used Office Furniture 19 - 4th Street NE	4,000	furniture	
26	Gain Gas Bar and Food 12 - 4th Street NE	1,000	auto service	gas station and convenience store
27	Holiday Cleaners & Coin Wash 18 - 4th Street NE	1,800	personal service	
28	OK Food Store	2,000	grocery & convenience	groceries & convenience
29	Retail Strip 24 - 36, 4th Street NE			older strip of retail buildings with apartments above
	Craig's Used Furniture	750	other retail	
	Emma's Upholstery	600	household service	
	Joe's Shoe Renew	600	personal service	
	De Waal Music Studio	750	personal service	
	Vacuum Service	750	household service	
30	Action Upholstery 38 - 4th Street NE	1,000	auto service	auto upholstery
31	Eisenberg's Fine Furniture 77 Edmonton Trail NE	10,000	furniture	
32	Luke's Value Drug Mart 112 - 4th Street NE	3,000	drugstore	
33	Alberta Furniture 102 - 4th Street NE	8,000	furniture	
34	Retail Strip 627 - 631, 1 Avenue NE			
	Deep Dish Pizza	750	restaurant	
	Riverside Cafe & Rest't	1,500	restaurant	
	Bridgeland Cleaners	400	personal service	

TOTAL RETAIL BUSINESSES:	37
TOTAL OCCUPIED SPACE (SQ. FT.):	65,850
TOTAL VACANT SPACE (SQ. FT.):	2,650

Data Source: Walker Brown Urban Consultants Ltd., December 1991 field survey.

Table 2:

1ST AVENUE NE RETAIL FLOORSPACE BY TYPE

TYPE OF USE	STUDY AREA (Sq. Ft.)	STUDY AREA %	EDMONTON TRAIL (Sq. Ft.)	EDMONTON TRAIL %	TOTAL (Sq. Ft)	TOTAL %
FOOD / GROCERY	7,200	40.2%	3,600	5.3%	10,800	12.7%
RESTAURANT	4,600	25.7%	5,300	7.9%	9,900	11.6%
PERSONAL SERVICE	1,100	6.1%	8,150	12.1%	9,250	10.9%
DRUGSTORE	2,800	15.6%	3,000	4.5%	5,800	6.8%
CONVENIENCE	1,600	8.9%	3,200	4.8%	4,800	5.6%
GENERAL MERCHANDISE	600	3.4%	33,500	49.8%	34,100	40.0%
AUTO SERVICES	0	0.0%	7,900	11.7%	7,900	9.3%
VACANT	0	0.0%	2,650	3.9%	2,650	3.1%
TOTAL	17,900	100.0%	67,300	100.0%	85,200	100.0%

Data Source: Walker Brown Urban Consultants Ltd., November 1991 field survey
Note: Study area retail floorspace excludes 3,100 sq. ft. of medical office floorspace from Table 1.
Edmonton Trail floorspace excludes 1,500 sq. ft. of streetfront office space shown in Table 1.

Table 3:

COMPARISON OF RETAIL MIX ON PEDESTRIAN SHOPPING STREETS

(Number of Businesses)

BUSINESS TYPE	17th AVENUE SW #	17th AVENUE SW %	4th STREET SW #	4th STREET SW %	1st AVENUE NE #	1st AVENUE NE %
Convenience, Grocery, Drug (1)	20	6.2%	13	14.6%	8	57.1%
Restaurant and Entertainment (2)	61	18.8%	26	29.2%	3	21.4%
Home Furnishings/Hardware (3)	26	8.0%	3	3.4%	0	0.0%
Apparel and Accessories (4)	55	17.0%	7	7.9%	0	0.0%
Automotive Sales, Service, Parts (5)	13	4.0%	2	2.2%	0	0.0%
Specialty and Other Retail (6)	86	26.5%	13	14.6%	1	7.1%
Personal Services (7)	63	19.4%	25	28.1%	2	14.3%
Total	324	100.0%	89	100.0%	14	100.0%

Data Source: Field surveys undertaken by Walker Brown Urban Consultants Ltd. 17th Avenue SW is from 1986. 4th Street SW data is from February 1991. 1st Avenue NE data is from December 1991.

Notes:
(1) includes combination stores, food/grocery, confectionery and sundries stores, drugstores and liquor
(2) includes restaurants and take-out food, recreation and health clubs, lounges, arcades, billiards
(3) includes furniture and appliance stores, TV, radio, stereo, electronics and hardware stores
(4) includes men's, women's and family clothing stores, family and specialty shoe stores and jewellery stores
(5) includes auto parts/accessories, auto sales/services, dealerships, gas stations, garages, car washes
(6) includes books and stationery, paint and wallpaper, flowers, plants, musical instruments and records, sporting goods, art galleries, print shops, gifts, antiques, toys and other
(7) includes hairstylists, barbers, cleaners, suntanning salons, travel agencies, funeral services, optical, photo finishing, etc.

floorspace on 1st Avenue is strongly concentrated in the areas of specialty food/groceries (40%) and Italian restaurants (25%). Drugstores (16%), convenience stores (9%), and personal services (6%) account for virtually all of the remaining floorspace. A florist shop is the only existing store in the "general merchandise" or semi-durable goods category (3%).

The Edmonton Trail commercial area currently accommodates an estimated 65,850 sq. ft. of occupied commercial floorspace in 37 businesses. Over 60% of this floorspace is comprised of "general merchandise" and "auto services" – retail categories that are absent from the nearby 1st Avenue study area. The majority of the general merchandise floorspace in the Edmonton Trail area is accounted for by four large furniture stores.

Table 3 provides a comparison of the 1st Avenue retail mix with two other pedestrian-oriented shopping streets in Calgary – 17th Avenue SW and 4th Street SW. The emphasis on food and drug stores on 1st Avenue is apparent where 57% of existing stores are represented by the "convenience, grocery and drugs" category as compared to 15% on 4th Street SW and 6% on 17th Avenue SW. The study area also accommodates a proportion of restaurants that is comparable to that of the 4th Street and 17th Avenue business mixes. The 1st Avenue business mix is distinguished by the virtual absence of home furnishings (provided nearby on Edmonton Trail), fashion and apparel goods, and other durable/semi-durable goods stores.

2.3 Character of the Business Area

With the exception of a "7-Eleven" convenience store, all stores in the study area provide pedestrian-oriented retail frontages. Despite this uniform pedestrian orientation, a number of physical design, operational, and business mix factors minimize the extent to which the area actually functions as a pedestrian-oriented comparison shopping destination. These factors include the following:

- A relatively small number of stores are spread over a 6 block area which lacks any compact retail clustering or focus.
- The existing Bow Valley Centre hospital parking lot absorbs 4 blocks of frontage on the south side of 1st Avenue.
- Uses such as single family dwellings, a large financial institution, and medical clinic space result in further separation between retail stores.
- Existing restaurants are most active at dinner and during the evening when other retail outlets on the street are closed. Drugstores are closed on Saturdays. Hours of operation among the relatively small number of businesses on 1st Avenue are not coordinated, further reducing the range of retail activity in the area at any particular time of day.

The general character of buildings in the study area is of older one and two storey commercial buildings interspersed with single family bungalows and older homes converted to commercial use. The exceptions to this profile are the two medical office buildings, both of which accommodate a pharmacy/drugstore at grade. Each of the medical office buildings provides approximately 20,000 sq. ft. of medical office space on four levels (3-stories plus basement level). Total office floorspace in the study area, including small offices on the second level of some older buildings, is estimated at approximately 46,000 sq. ft.

The medical office buildings and the First Calgary Financial institution provide adequate parking in underground or surface lots. The majority of remaining businesses provide very few on-site parking stalls. Customer parking requirements are accommodated primarily by free parking (2-hour time limit) on 1st Avenue and adjacent sidestreets.

2.4 Business Questionnaire

Questionnaires were distributed in December 1991 to all businesses and medical offices in the study area. Completed questionnaires were received from 9 of the 14 retail businesses, representing a 64% response rate. Completed questionnaires were also received from 11 medical offices.

A copy of the business questionnaire and tabulation of results is provided in Appendix A. A summary of results is presented below.

- 1st Avenue businesses feel that quality service and friendliness are the key strengths of existing stores in the area. Accessibility by car, and convenient hours of operation are also rated highly by businesses.

- Businesses rate 1st Avenue as less than satisfactory in terms of customer parking and the level of business promotion through sales or special events. They consider the absence of recreation and entertainment opportunities to be a drawback of the area. They think that the area does not contain an adequate variety of stores, and that the physical condition of the public street and private buildings is poor.

- Improvements to the area that existing businesses would like to see include the following (in order of response frequency):

  - more/better parking;
  - greater variety of businesses;
  - physical improvements to storefronts;

  - more retail frontage at-grade on 1st Avenue; and
  - slower traffic on 1st Avenue.

- Existing businesses on 1st Avenue have been very stable. 15 of the 19 businesses surveyed have been located on 1st Avenue for more than 5 years. Proximity to the Bow Valley Centre Hospital along with the area's central location within the City are the major factors that caused existing businesses to locate on 1st Avenue. All respondents continue to feel that 1st Avenue is a good location for their business and are planning to remain in this location in the future.

- On average for all businesses surveyed, 78% of customers and 95% of employees arrive at 1st Avenue by car. The majority of respondents feel that existing parking is adequate for employees but inadequate for customers.

- Most businesses feel the most effective way to improve business on 1st Avenue will be to attract a greater variety of small specialty stores to the area and to encourage shoppers to stroll and comparison shop. More retail frontage on the street, improved storefront design, and longer business hours were also suggested. Clothing stores, restaurants, coffee shops or pubs, hardware and craft stores were also frequently suggested.

- The majority of retail respondents advertise regularly (medical offices do not). Flyers and magazines are the most common form of advertising, along with newspapers and TV listings. Of those who advertise, average annual advertising expenditure is $2,400.

- Three of six responding retail businesses indicated they would consider participating in coordinated business area improvement initiatives. Two of three medical office respondents would consider coordinated initiatives.

- Only one of six retail business respondents indicated they would consider financial support for coordinated business area improvement initiatives. Two retail respondents "might" consider financial support and three "would not" consider financial support. Medical offices were somewhat more supportive of both coordinated initiatives and financial support for any such initiatives.

3.0 CONSUMER RESEARCH

3.1 On-Street Shopper Interviews

On-street interviews were undertaken with 106 shoppers on 1st Avenue NE. The initial 54 interviews occurred in early December 1991. An additional 52 interviews were undertaken during March 1992. Interview locations were distributed throughout the study area on weekdays and on Saturdays between the hours of 10 am and 4:30 pm.

A copy of the questionnaire and results of the 106 random on-street shopper intercept interviews are presented in tabular form in Appendix B. Results are summarized below.

- The downtown is the shopping area visited most often by 1st Avenue shoppers for non-grocery items (33% of respondents). The downtown area is conveniently located for these shoppers, accessible by bus, close to employment, and provides good variety and selection.

- The northeast regional shopping centres of Sunridge Mall and Marlborough Mall are also visited "most often" by a significant number of 1st Avenue shoppers (13% and 10% respectively). The fact that these centres are located conveniently close-by is the only major reason cited for shopping "most often" at these centres.

- Beyond the 3 shopping areas noted above, respondents shop "most often" at centres distributed throughout the City. The majority of remaining respondents shop "most often" at northeast and northwest Calgary centres such as Franklin Mall, Market Mall, North Hill Mall, and Deerfoot Mall. However, south Calgary centres such as Chinook Centre, Southcentre, and 17th Avenue are visited "most often" by as many respondents as any individual north Calgary Centre with the exception of the Downtown, Sunridge and Marlborough.

- Food stores visited "most often" by 1st Avenue shoppers include Safeway and Co-op food stores located in northeast Calgary. Most respondents visit food stores located in the 16th Avenue and Centre Street NE area. Other food stores visited "most often" by a high proportion of respondents are located in northwest (18%) and southwest Calgary (11%). "Convenience" is the major reason for shopping at these food stores most often (62%) followed by "prices and selection" (18%).

- 57% of respondents shop on 1st Avenue at least twice a month or more frequently. 24% of respondents shop on 1st Avenue once every 1 to 4 months. The remaining 18% of shoppers interviewed indicated that they shop less frequently on 1st Avenue (12%) or were first-time visitors to the area (6%).

- Respondents who shop 1st Avenue "rarely or never" (13 respondents) indicated that they do not shop in the area more often because:
    - they can get everything they need closer to home;
    - they were mainly in the area to work or visit the hospital;
    - there is nothing on 1st Avenue of particular interest.
- Of those respondents who do shop on 1st Avenue on a regular basis, (87 respondents) the majority do so in order to purchase a particular item or product (58%). Other major reasons for shopping on 1st Avenue include "convenient nearby location" (43%), "quality of products" (32%), and "friendliness or atmosphere" (16%).
- Italian food stores are the type of store visited most often by respondents. The Italian grocery and the bakery are each visited by close to 25% of respondents. Other stores visited by a significant proportion of respondents include the Northeast Grocery/Deli convenience store (12%), personal and professional services such as hairdressers, banks, medical offices (11%), pharmacies (10%) other convenience stores such as 7-Eleven (9%) and restaurants (5%).
- 53% of respondents arrive at 1st Avenue by car and the majority of these "drivers" (76%) normally park on the street (1st Avenue or side-street). Of those who drive, 78% indicated that parking is not a problem. The remaining 22% say that the area is congested at some times of the day and parking stalls are difficult to find.
- 23% of respondents were linking their 1st Avenue shopping trip with a visit to the Bow Valley Centre Hospital or another local institution. These hospital users represented visitors, staff and patients in approximately equal numbers.
- New stores that respondents would like to see in the area included a major grocery store; specialty shops such as butchers, greengrocers, and craft stores; household goods and hardware stores; clothing and shoe stores. They would also like to see more restaurants of all kinds, particularly cafes, bistros, coffee shops and some non-ethnic restaurant representation on 1st Avenue. A post office, park with benches, theatre, and fitness club were also suggested less frequently as desirable additions to the 1st Avenue business area.

- Respondents indicated that provision of more services and recreation/entertainment opportunities such as a post office, park, theatre, pub, etc. would be a significant factor in attracting them to shop on 1st Avenue more often. A greater number/variety of retail stores would also result in more frequent shopping in the area. The addition of more restaurants would have a more moderately positive effect on shopping frequency.

- On a scale of 1 to 5 respondents rated most aspects of the existing 1st Avenue shopping experience as "3" or "average." Relatively high ratings are for "service quality and friendliness," "unique specialty stores," and "competitive price." Relatively low ratings are for "customer parking,"promotions, sales and events," and "entertainment/recreation" facilities. Shoppers rated the variety of stores, accessibility by car, and the condition of stores/streetscape, as average.

- Open ended comments by shoppers indicate that friendliness, the ethnic flavour, and the Italian stores are key things that shoppers like about the area. Key dislikes include the limited variety of stores, the condition of storefronts and sidewalks, and – to a more limited extent – the traffic on 1st Avenue.

- The most effective improvements for increasing shopping frequency include "adding more stores and services" and a "European Village design theme." Other effective improvements include "slower traffic/safer pedestrian crossings," adding stores on the hospital parking lot, and more advertising, sales/promotions. Slightly less effective improvements in terms of increasing the shopping frequency of existing shoppers are "improved customer parking" and improvements to sidewalks, street lighting and benches (2.31).

- 62% of respondents indicated an interest in promotional events such as a street fair, sidewalk sales and outdoor entertainment. 28% of respondents indicated no significant interest in such promotional events.

- The residences of 1st Avenue shoppers interviewed provide an indication of the trade area size and market draw of 1st Avenue businesses. Shoppers interviewed reside in the following areas of Calgary:

– Bridgeland-Riverside	46%
– Calgary Inner City	19%
– North Calgary Suburbs	21%

– South Calgary Suburbs	10%
– Outside Calgary	4%

Of the 48 Bridgeland-Riverside residents interviewed, 8 were associated with the BVC hospital as an employee, patient, or visitor. Of the remaining 58 respondents who reside outside of the local area, 17 were associated as an employee, visitor, or patient of the hospital or other local medical offices and institutions.

- The trading area or area from which businesses draw their customers varies widely for different 1st Avenue businesses. The specialty food stores, for example, draw in the range of 6% to 31% of their retail customers from local residents. The drugstores on 1st Avenue draw in the range of 60% to 85% of their customers from patients of the medical offices and clinics on 1st Avenue and an additional 15% from the hospital, while only 5 to 20% of customers are local residents. The medical offices and clinics draw the majority of their clientele from residents of inner communities (31%), residents of other Calgary suburban areas (35%), and directly from hospital patients (15%). The majority of customers who use personal services (hair dressers, cleaners, etc.) are drawn from Bridgeland-Riverside and adjacent communities (57%), other inner city residents (17%) and hospital users (11%).

3.2 Specialty Store "Exit Surveys"

During the course of the market study it was recognized that random on-street interviews did not clearly reflect the unique City-wide market draw of the 1st Avenue specialty food stores. In order to clarify the nature of this specialty food function, 201 short "exit surveys" were undertaken on Saturday February 29, 1992 at the Italian Centre grocery store, the City Bakery, and the Italian Gourmet Foods store (fresh pasta).

A copy of the "Exit Survey" and tabulation of results are presented in Appendix C. This section summarizes results of the survey.

- The total of 201 interviews were undertaken at the City Bakery (81), the Italian grocery (70), and the Italian deli/pasta store (50).

- The majority of shoppers tend to visit these specialty food stores an average of 3 times per month. 62% of all shoppers interviewed visit the stores between 1 and 4 times a month. Specialty food shopping appears to be a once-a-week or once every two weeks type of activity for most customers. The bakery has the highest proportion of frequent visitors (once a week or more).

- The trade area of specialty food stores on 1st Avenue is much broader than that of other 1st Avenue commercial functions. On average for all 3 stores, customers reside in the following Calgary areas.

– Bridgeland-Riverside	20%
– Calgary Inner City	33%
– North Calgary Suburbs	23%
– South Calgary Suburbs	17%
– Outside Calgary	6%

- The bakery serves the most "local" retail function of the 3 specialty food stores, with 31% of its customers from the Bridgeland-Riverside neighbourhood. (The City Bakery and the Italian Gourmet deli also operate wholesale distribution operations from their 1st Avenue locations). The Italian Centre grocery attracts 17% of its customers from the local neighbourhood while the Italian Gourmet deli attracts only 6% of its customers from the local neighbourhood.

- Specialty food store customers tend to visit other 1st Avenue stores while they are shopping in the area (63%). However, this interaction is limited to other specialty food stores in the area. The local residents who patronize the bakery will also visit convenience stores and pharmacies while shopping on 1st Avenue. The only linked shopping trips between specialty food stores in the study area and stores located nearby on Edmonton Trail, is with "Rupp's Deli," a specialty meat market and butcher shop.

- Shoppers at the 1st Avenue specialty food stores visit the area primarily to purchase unique and/or high quality Italian specialty foods. Only in the case of the bakery was "convenience" or proximity to home cited as a significant reason for shopping by some respondents (17%). Secondary reasons for visiting 1st Avenue specialty food stores include the friendly service and the interesting European or ethnic atmosphere of the street.

- Few customers link their specialty food shopping trips with any business at the BVC hospital. 94% of the customers at the deli and the grocery and 84% of bakery customers indicated that they "never" have any reason to visit the hospital while shopping on 1st Avenue. Of those who do link a hospital visit to their shopping, 85% are hospital visitors, and 15% are staff. Hospital patients do not appear to visit 1st Avenue specialty food stores with any significant frequency.

3.3 Bow Valley Centre Hospital Interviews

Interviews were undertaken with 116 hospital users on Wednesday, January 15, 1992. To determine how hospital staff, visitors and patients currently use the 1st Avenue business area and what improvements would attract them to shop in the area more often. Interviews were conducted from 4 locations within the hospital including the 3 major entrances and immediately outside the hospital cafeteria.

The hospital interview questionnaire and tabular results are presented in Appendix D. Results of the survey are summarized below.

- A total of 158 hospital users were approached for an interview of which 42 claimed to have no awareness of any retail stores or services in the vicinity of the hospital (aside from internal gift shop and cafeteria functions). Interviewers advise that virtually all of these non-qualified prospects were first-time patients and visitors or occasional visitors. Only the remaining 116 hospital users who were aware of businesses on 1st Avenue were interviewed. Of the 116 respondents interviewed, 67 were hospital staff, 37 were visitors and 12 were patients.

- Only 19% of staff, 17% of patients, and 5% of visitors shop on 1st Avenue "regularly." In total, 77% of staff, 59% of patients and 29% of visitors visit 1st Avenue stores either regularly or "sometimes." Those who "never" shop on 1st Avenue include 22% of staff, 42% of patients, and 70% of visitors.

- A high proportion of respondents who do shop "regularly" or "sometimes" at 1st Avenue stores are not sure how much money they spend at these stores during an average month (30%). However, the most frequently cited spending range was only $10 to $25 per month (30% of respondents or 43% of those citing an actual average spending range).

- The bakery, food stores and restaurants are the stores that are most frequently visited by hospital users. Other stores visited regularly include convenience stores and drugstores.

- The majority of hospital users who don't shop on 1st Avenue (particularly patients and visitors) indicated that they prefer to shop closer to where they live. Hospital staff who don't shop on 1st Avenue are too busy at work and don't have time to shop while they are in the area.

- Hospital users have few strong likes or dislikes about the commercial area. They like the convenience of 1st Avenue stores, the restaurants, the attractive buildings, the ethnic flavour, the small shops and the bakery. Hospital staff are concerned about parking in the area. Visitors are very dissatisfied with the lack of fast food and/or inexpensive restaurants, traffic congestion and the lack of parking.

- A majority of staff (58%) and visitors (54%) would like to see a greater number and variety of businesses located on 1st Avenue. A large majority of patients (75%) would not like to see more businesses.

- Hospital staff would like to see a greater variety of restaurants, convenient auto services, food and grocery stores, galleries, specialty shops, dry cleaning, post office, toys and crafts. Visitors would like to see more variety of restaurants, food and grocery stores, and ethnic/specialty shops. 87% of staff and 60% of visitors who would like to see more stores on 1st Avenue (50% and 32% of the total sample of staff and visitors respectively) indicated that they would shop at 1st Avenue stores either "much more often" or "a bit more often" if these suggested new stores and services were in place.

- Reasons for not wanting to see more stores and services on 1st Avenue included "prefer to shop closer to home"; "like the area the way it is already"; "enough stores and traffic already"; and "no time to shop while at the hospital". Only one respondent (a patient) indicated that the hospital area should be a quiet area.

- A "European Village theme" was rated as the most effective means to encourage more hospital users to shop on 1st Avenue more often. This was closely followed by "more stores and services"; "more sales and promotions" and "more advertising." Advertising and promotions were considered the most effective means to get hospital staff to shop in the area more often.

- Open-ended comments by hospital staff indicate that they would like to see the commercial area physically cleaned-up and brightened. They would also like to see a greater variety of specialty stores with an overall ethnic flavour. At the same time they are wary of parking and traffic impacts and therefore would like to see a balance of new specialty stores and stores/services that serve the community and hospital populations. They would like to see more physical and activity integration between the hospital and the community/business area. In particular they suggest more "casual" restaurants and more advertising/promotion of businesses within the hospital.

3.4 Other Local Institutions

The Bow Valley Centre Hospital is the largest by far of a number of institutions located immediately south of the 1st Avenue business area. Open-ended telephone interviews were conducted with representatives of other institutions in the area in order to determine the nature of the existing and potential market for 1st Avenue retail businesses.

Boyack Nursing Home and Crossbow Auxiliary Hospital (Carewest)

These combined facilities accommodate approximately 265 employees, 221 senior residents, and 30 outpatients per day, providing non-profit, long-term and outpatient care to senior citizens and the disabled. 1st Avenue stores visited regularly include stores at the east-end of the commercial area – notably the ice-cream shop, the NE Grocery convenience store, and the Pizza Maria and La Brezza restaurants which are visited regularly by staff. They are generally very satisfied with the mix of stores and services already available in the area and like the friendliness, quality, and reasonable prices. They would most like to see improvement in the environmental quality of the area, especially streetscape improvements, slower traffic/safer pedestrian crossings, and development of some new stores/services on the south side hospital parking lot area.

Columbus Manor

This 9-storey senior citizens' residence accommodates approximately 125 residents and 2 full-time employees. The average resident visits 1st Avenue to shop approximately once per month when they will most likely visit the grocery store, the deli, or a drugstore. They like the commercial area as it is now and see little reason to change it. In particular they appreciate the friendliness of merchants and the Italian ethnic flavour. The only improvement desired is reinforcement of the existing European flavour of the area. A good "Safeway" type of grocery store would increase the amount that they shop in the area.

Bow Valley Lodges

This seniors' residence accommodates approximately 260 residents in self-contained housing units and 40 full-time staff. The average age of residents is 85. Staff members visit 1st Avenue stores/services approximately once a week. Typically, about 15% of residents will visit the 1st Avenue bank, medical offices, drugstores, food stores or restaurants each day. They appreciate the convenience of 1st Avenue stores but find the hill between the residence and the stores makes access difficult for many seniors. They would like to see some more retail outlets. In particular they would like to see a small department-type store and a post office. They would also like to see environmental improvements in the area, particularly streetscape improvements, slower traffic/safer pedestrian crossings, and stores on the south side of the Avenue.

Christine Meikle School

The Christine Meikle School provides day programs in daily living skills for handicapped students. It accommodates 30 staff members and approximately 60 students. Staff members use the local restaurants on 1st Avenue. The commercial area is considered an excellent neighbour in that it provides an ideal setting for field trips as part of the life skills training program for students. Like other local institutions, physical improvements to the environmental quality of the area, including streetscape improvements, wheelchair accessibility, European theme, and slower traffic are preferred initiatives. Increased stores, parking, and advertising are seen has having potentially negative impacts.

4.0 MARKET ANALYSIS

4.1 Trade Area Delineation

The "trading area" of a shopping centre or business area is generally considered to be the area from which approximately 85% of all shopping trips originate. A number of 1st Avenue retail businesses draw the majority of their customers from throughout the City of Calgary either directly as in the case of specialty food stores and restaurants or indirectly as in the case of the drugstores which rely primarily on patients visiting 1st Avenue medical offices. These stores and medical services are providing specialized or unique goods and services for which customers are willing to travel from all parts of the City.

The trade area for study area businesses consists of three distinct segments. These are noted below along with the estimated proportion of total retail sales that is derived from each segment.

1.	Bridgeland-Riverside community residents	(20-25%)
2.	Staff, patients and visitors at Bow Valley Centre Hospital and local medical offices	(30-35%)
3.	Residents of the remaining City-wide trade area	(40-45%)

It is clear that the 1st Avenue study area serves a City-wide trade area. However, an estimated 50-55% of total sales to study area businesses are from the immediate local area which includes community residents along with users of the Bow Valley Centre Hospital and medical offices on 1st Avenue. The remaining 40-45% of current sales are to residents of communities that are spread evenly throughout the City of Calgary and beyond.

The trade area varies widely for different types of businesses on 1st Avenue. Specialty food stores, for example, draw 26% of their customers from Bridgeland-Riverside or adjacent neighbourhoods and 64% from communities throughout the City and beyond. Approximately ten percent of these specialty food customers are linking their shopping with a visit to the hospital. The origin of drugstore customers is highly related to the origin of patients visiting medical offices on 1st Avenue and this market, in turn, is highly based on the Bow Valley Centre Hospital. These patients come from inner communities (30%), other Calgary suburban areas (35%), and directly from the hospital (15%). The customers of grocery/convenience stores and personal services tend to be more locally based where 35% of customers are Bridgeland-Riverside residents; 20-30% are linked to the hospital; and 35-45% are from outside the local area.

4.2 Retail Expenditure Profiles for Trade Area Segments

Table 4 describes per capita expenditures on retail goods and services that can be expected to be made by residents of each trade area segment during 1991.

Per capita expenditure estimates are based on Statistics Canada information for provincial consumer expenditure patterns in Alberta (see Appendix E – Table E1 and Table E2). Average provincial expenditures have been adjusted for residents of Calgary and residents of the Bridgeland-Riverside community in proportion to median taxfiler income levels (see Table 5). Per capita retail expenditures by Bow Valley Centre Hospital users are assumed to be the same as for the City of Calgary.

Annual per capita retail expenditures have been estimated for the categories of goods and services that are currently represented on 1st Avenue. As shown in Table 4, per capita expenditure by City of Calgary residents is estimated at $309 per year for "non-supermarket grocery and convenience stores"; $82 for other specialty food stores; $411 for drugstores; $583 for "other durable & semi-durable goods" (excludes expenditures in stores that are not currently represented on 1st Avenue such as department stores, clothing stores, household furnishings and appliances stores); $651 for restaurants; and $170 for personal services. Total per capita expenditures by City of Calgary residents at the above-noted types of stores and services is estimated to be $2,206. Total per capita expenditures by Bridgeland-Riverside residents at these retail stores and services is estimated to be $1,756.

Appendix Tables E1 and E2 provide background information on historic expenditure patterns for recent years. Estimated 1991 expenditure levels used in this report reflect the significant decline in retail sales levels experienced during 1991 relative to previous years.

4.3 Trade Area Population and Growth Projections

Table 5 shows projected population growth in each of the 1st Avenue trade area segments for the period 1991 to 2006.

Bridgeland-Riverside Local Market Segment

The 1991 Bridgeland-Riverside population of 4,813 persons represents a decline of 434 persons during the past decade. The number of housing units in the community remained stable during the same 10 year period. During the past two years, Bridgeland-Riverside has experienced significant

Table 4:
RETAIL EXPENDITURE PROFILE / 1991

	ALBERTA	CITY OF CALGARY	BRIDGELAND-RIVERSIDE
POPULATION	2,522,000	708,593	4,813
INCOME INDEX (1)	100.0	109.8	84.4
PERSONAL DISPOSABLE INCOME PER CAPITA (2)	$17,446	$19,156	$14,724
TOTAL EXPENDITURE POTENTIAL ($millions)	$43,998.8	$13,573.8	$70.9
RETAIL SALES TO PDI RATIO	42.9%	42.9%	42.9%
TOTAL RETAIL GOODS EXPENDITURE ($millions)	$18,875.5	$5,823.2	$30.4
PER CAPITA RETAIL EXPENDITURE	$7,484.3	$8,218.0	$6,316.2
PER CAPITA RETAIL EXPENDITURE AT SELECTED TYPES OF STORES (3)			
Non-Supermarket Grocery & Convenience	$281	$309	$237
Other Specialty Food Stores	$75	$82	$63
Drugstores	$374	$411	$316
Other Durable & Semi-Durable Goods (4)	$531	$583	$448
PER CAPITA RESTAURANT EXPENDITURES (5)	$593	$651	$549
PER CAPITA PERSONAL SERVICES (6)	$155	$170	$143
TOTAL PER CAPITA EXPENDITURE FOR SELECTED GOODS AND SERVICES	$2,009	$2,206	$1,756

Data Sources:

1 Based on Revenue Canada "Taxation Statistics" / 1989 income data. The income index represents the income level of taxfilers relative to the provincial median income level.

2 See Table E1 in Appendix E attached to this report for derivation of per capita disposable income.

3 For types of stores that are currently represented on 1st Avenue NE. Based on full retail expenditure profile shown in Appendix Table E2.

4 Excludes sales to department stores, clothing and shoe stores, and household furnishings/appliances stores. Includes sales to specialized "other semi-durable goods stores" (books, stationery, florists, hardware, paint & wallpaper, toys, hobby, etc.) and "other durable goods stores" (sporting goods, musical instruments, records, jewellery, cameras, etc.

5 Based on Statistics Canada Catalogue No. 63-011, Restaurant, Caterer and Tavern Statistics, January 1992. Includes licensed and unlicensed restaurants, take-outs and taverns. Excludes caterers.

6 Based on Statistics Canada Catalogue No.63-233, Leisure and Personal Services, December 1991. Includes barber/beauty shops, laundries/cleaners, garment repair, and health clubs.

population growth averaging approximately 3% per year. The majority of this growth has been accommodated in existing units within the community. Vacancy rates have continued to decline from very high rates experienced during the mid 1980's.

Based on recent moderate growth trends in the community and a positive expectation for inner city intensification in Calgary during the next decade, average population growth of 1% per year for Bridgeland-Riverside can be expected. This level of growth is comparable to actual population growth levels experienced during the 1986 to 1991 period. It also assumes that as vacancy rates have now reached normal levels there will be some increase in new units within the community, through conversion of existing units, new infill development, or new multi-family apartment development. Projected population growth of 1% per year will provide an increase of 781 persons in the local community between 1991 and 2006.

Bow Valley Centre Hospital Market Segment

The Bow Valley Centre hospital currently has a full time equivalent staff of approximately 2,500 persons (3,300 total full and part-time) and 640 beds or "in-patients." The total number of visitors and outpatients must be estimated based on available parking statistics. A conservative figure of approximately 375 visitors/outpatients per day has been selected for purposes of this retail market study. It should be noted that this is a very conservative estimate, based on the number of paid hospital parking lot spaces used by non-staff "visitors."

The Bow Valley Centre is currently planning an extensive redevelopment program which will renew the aging physical plant and better accommodate the hospital's changing health services. During the next decade the Bow Valley Centre will accommodate fewer in-patients. Rather, it will increasingly become a regional out-patient referral centre for specialized health services. As a consequence of this changing health service orientation, hospital planners expect growth in the number of outpatients and visitors of 10 to 20% per year. This growth rate is expected to continue until current outpatient/visitor numbers are doubled.

As shown in Table 5, growth in the number of outpatients/visitors can be expected to increase from current levels of 10,000 "persons" per year to 20,000 "persons" per year by 2001 based on an average of 10 visits per year. It is difficult to estimate the number of "one-time only" visitors versus repeat visitors who come to the hospital on a regular basis. However, for purposes of this study, it is clear that growth in visitation of 10% per year over 10 years presents the opportunity to double current retail sales to the Bow Valley Centre visitor/patient group. This could reasonably be expected to be the case

Table 5:
POPULATION GROWTH BY TRADE AREA SEGMENT / 1986-2006

	1986	1991	1996	2001	2006
BRIDGELAND-RIVERSIDE					
Occupied Dwellings (1)	2,305	2,422	2,522	2,647	2,797
Average Occupancy Rate	2.00	1.99	2.00	2.00	2.00
Population	4,604	4,813	5,044	5,294	5,594
Average Annual Population Grow	-93	42	46	50	60
Population Growth Rate	-1.8%	0.9%	1.0%	1.0%	1.1%
Median Income Index	77.4	77.6	80.0	80.0	80.0
BOW VALLEY CENTRE USERS					
FTE Staff Members	n/a	2,500	2,500	2,500	2,500
Outpatients and Visitors (2)	n/a	10,000	15,000	20,000	20,000
Median Income	n/a	100.0	100.0	100.0	100.0
REMAINING CITY OF CALGARY					
City Population (3)	640,645	708,593	796,500	870,000	950,000
Average Annual Growth	9,780	13,590	17,581	14,700	16,000
Average Annual Rate	1.7%	2.1%	2.5%	1.8%	1.8%
Median Income Index	100.0	100.0	100.0	100.0	100.0
Remaining City Population (4)	n/a	691,280	773,956	842,206	921,906

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1 Walker Brown Urban Consultants Ltd. forecast based on net growth in dwelling units of 20 units per year during 1991-1996, 25 units per year during 1996-2001, and 30 units per year during 2001-2006.
2 Walker Brown Urban Consultants Ltd. conservative estimate based on parking data which indicate 375 outpatients and visitors per day. Assumes average of 10 visits per year per visitor and approximately 10,000 unique individual per year. Forecast based on 10% growth in outpatients and visitors per year, capping at double current levels.
3 Long-term population forecast, City of Calgary, Corporate Resources Department.
4 Net City population after deductions for Bridgeland-Riverside poulation and allowance for hospital users. No information is available on the number of hospital visitors from outside Calgary. Therefore, the analysis is conservative in that it underestimates the remaining City-wide market.

regardless of whether the increase in visits is primarily in the form of new "one-time" visitors, or more frequent repeat-visits.

City-Wide Market

City of Calgary population growth is expected to average in the range of 1.8% to 2.5% per year during the next 10 to 15 years. This represents average annual population growth in the range of 14,000 to 17,600 persons per year.

Existing 1st Avenue specialty food stores and restaurants draw the single largest share of their current trade from this remaining City-wide market segment. They achieve a wide geographical market draw with limited market penetration into any particular City sector or sub-area. Given this situation, the future market share of these 1st Avenue businesses will not depend primarily on the specific amount and location of competitive City-wide retail floorspace. Rather, the future market share potential will depend on the ability of these businesses to continue to provide a product to the consumer that is unique and different from the standard forms of retail competition which exist throughout the City.

4.4 Existing Market Share

Table 6 describes the growth in total retail expenditure (sales) potential that can be expected from each of the 1st Avenue market segments during the 1991 to 2006 period. As shown in Table 6, annual retail expenditures by the year 2006 are expected to have increased by $1.4 million per year from the local Bridgeland-Riverside community; by $22.0 million per year from Bow Valley Centre hospital users; and by $508.8 million per year from the remaining City-wide market segment. Growth in market potential is attributable to population growth only. Expenditures shown represent expenditures at types of stores and services that are currently located on 1st Avenue (i.e., sales to department stores, supermarkets, etc. are not included).

Given the total 1991 retail expenditure potential from each of the three trade area segments, it is possible to estimate the market share that is currently being achieved by 1st Avenue businesses. Estimated current sales by 1st Avenue businesses as shown in Table 7 are based on existing retail floorspace levels (sq.ft.) on 1st Avenue by type of business, and industry average productivity levels (sales per sq.ft.) for each type of business. Current sales levels are broken down by trade area segment, according to results obtained in merchant and consumer surveys. These current sales levels are then compared with total expenditure potential in each trade area segment to derive an estimate of the current market share being achieved by 1st Avenue businesses. These current 1991 market share estimates are summarized below.

EXISTING MARKET SHARE ESTIMATES BY MARKET SEGMENT

	Bridgeland Riverside Market	Hospital Related Market	Remaining City-Wide Market
Specialty Food	29.7%	2.9%	0.8%
Drugstores	9.2%	20.4%	0.1%
Restaurants	2.6%	1.3%	0.1%
Personal Services	8.4%	2.3%	0.0%
Other Durable & Semi-Durable Goods	0.6%	0.6%	0.0%
Non-Supermarket Grocery & Convenience	73.0%	12.3%	0.5%
AVERAGE	14.22%	7.80%	0.16%

4.5 Office Floorspace Demand

1st Avenue currently accommodates 46,000 sq. ft. of office floorspace. Virtually all of this office space is located in two 20,000 sq. ft. medical office buildings. The Bridgeland Medical Building is owned and operated as a doctors cooperative venture and is fully leased. The Bridgeland Professional Centre building appears to have had vacancies of 20% during the past year but is now fully leased at market lease rates.

Despite some suburban office and employment centre development activity in Calgary during the past 15 years, the office market in Calgary continues to be highly dominated by the downtown area. Some office development has occured in inner-city commercial districts such as Kensington, 17th Avenue SW, and 4th Street SW. However, in all three cases, current lease rates are generally low and demand for existing office space has traditionally been weak.

In the vicinity of 1st Avenue NE, office development has occured on Centre Street N. Both Centre Street and Edmonton Trail offer superior locations to 1st Avenue for future general office development serving the "off-downtown" general office market. Both locations provide comparable accessibility to downtown while offering direct access to major roadways leading to the downtown area. These areas will continue to accommodate any future demand for general office floorspace in the close-in northeast area.

Table 6:

TOTAL EXPENDITURE POTENTIAL BY TRADE AREA SEGMENTS

Selected Goods and Services (1)

	1991	1996	2001	2006
BRIDGELAND-RIVERSIDE MARKET				
Population	4,813	5,044	5,294	5,594
Per Capita Expenditure (2)	$1,756	$1,756	$1,756	$1,756
Expenditure Potential ($000's)	$8,451.6	$8,857.3	$9,296.3	$9,823.1
1991 to 2006 Growth ($000's)				$1,371.4
HOSPITAL BASED MARKET				
Staff, Outpatients, Visitors	12,500	17,500	22,500	22,500
Per Capita Expenditure (2)	$2,206	$2,206	$2,206	$2,206
Expenditure Potential ($000's)	$27,575.0	$38,605.0	$49,635.0	$49,635.0
1991 to 2006 Growth ($000's)				$22,060.0
REMAINING CITY-WIDE MARKET				
Population (3)	691,280	773,956	842,206	921,906
Per Capita Expenditure (2)	$2,206	$2,206	$2,206	$2,206
Expenditure Potential ($000's)	$1,524,963.7	$1,707,346.9	$1,857,906.4	$2,033,724.6
1991 to 2006 Growth ($000's)				$508,761.0

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1 Includes potential expenditure on non-supermarket grocery & convenience food; drugstores; restaurants; personal services; other durable and semi-durable goods. See Table 4.

2 Analysis assumes current dollars for both expenditure growth and productivity (sales per sq. ft.). Real (after inflation) expenditure growth will be balanced by real growth in productivity (sales per sq. ft.) for purposes of floorspace residual analysis.

3 City population excludes local residents and hospital-related population.

Table 7:

CURRENT MARKET SHARE ANALYSIS / 1991

TYPE OF RETAIL	CURRENT 1st AVE. SALES (1)	BREAKDOWN OF CURRENT SALES (2)			TOTAL EXPENDITURE POTENTIAL (3)			MARKET SHARE		
		LOCAL RESIDENTS	HOSPITAL BASED	CITY & INFLOW	LOCAL RESIDENTS	HOSPITAL BASED	REMAINING CITY-WIDE	LOC. RES.	HOSP-ITAL	CITY
SPECIALTY FOOD	$600,000	$90,000 15%	$30,000 5%	$480,000 80%	$303,219	$1,025,000	$56,684,960	29.7%	2.9%	0.8%
DRUGSTORES	$1,400,000	$140,000 10%	$1,050,000 75%	$210,000 15%	$1,520,908	$5,137,500	$284,116,080	9.2%	20.4%	0.1%
RESTAURANTS	$690,000	$69,000 10%	$103,500 15%	$517,500 75%	$2,642,337	$8,137,500	$450,023,280	2.6%	1.3%	0.1%
PERSONAL SERVICES	$165,000	$57,750 35%	$49,500 30%	$57,750 35%	$688,259	$2,125,000	$117,517,600	8.4%	2.3%	0.0%
OTHER DURABLE & SEMI-DURABLE GOODS	$120,000	$12,000 10%	$42,000 35%	$66,000 55%	$2,156,224	$7,287,500	$403,016,240	0.6%	0.6%	0.0%
NON-SUPERMARKET GROCERY & CONVENIENCE	$2,380,000	$833,000 35%	$476,000 20%	$1,071,000 45%	$1,140,681	$3,862,500	$213,605,520	73.0%	12.3%	0.5%
TOTAL	$5,355,000 100%	$1,201,751 22%	$1,751,002 33%	$2,402,253 45%	$8,451,628	$27,575,000	$1,524,963,680	14.22%	6.35%	0.16%

1 Current sales based on existing floorspace and estimated productivity (sales per sq.ft.) by type of store.
2 Current sales breakdown trade area segment based on merchant and shopper surveys.
3 Total expenditure potential includes only expenditure at types of stores currently represented on 1st Avenue NE. Expenditure at supermarkets and department stores not included.

Table 8:

INVENTORY OF MEDICAL AND GENERAL OFFICE FLOORSPACE WITHIN A ONE KILOMETRE RADIUS OF SELECTED CALGARY HOSPITAL

HOSPITAL	MEDICAL OFFICE FLOORSPACE Sq. Ft.	%	GENERAL OFFICE FLOORSPACE Sq. Ft.	%	TOTAL OFFICE FLOORSPACE Sq Ft.	%
Alberta Children's Hospital	8,137	3%	307,538	97%	315,675	100%
Foothills Hospital	419,141	97%	14,725	3%	433,866	100%
Holy Cross Hospital	178,544	39%	279,008	61%	457,552	100%
Peter Lougheed Centre	95,910	100%	0	0%	95,910	100%
Rockyview Hospital	52,702	26%	146,286	74%	198,988	100%
Bow Valley Centre	33,500	97%	900	3%	34,400	100%

Data Source: Walker Brown Urban Consultants Ltd. February 1992 field survey.

Any future office floorspace demand on 1st Avenue will be in the form of medical offices related to the Bow Valley Centre hospital.

An inventory of medical office floorspace within a one kilometre radius of major Calgary hospitals is shown in Table 8. Medical office floorspace within one kilometre of the Bow Valley Centre is entirely represented by the existing 40,000 sq. ft. of floorspace in purpose-built medical office buildings on 1st Avenue. This is the lowest level of medical office floorspace in the vicinity of major hospitals surveyed. Given that the Bow Valley Centre (BVC) is one of the largest medical institutions in the City, there would appear to be some room for future growth in medical office space beyond current levels. Discussions with BVC hospital planners indicate that with change in the function of the hospital toward a regional out-patient referral centre, there is likely to be an increased desire on the part of private medical specialists to maintain offices in the vicinity of the hospital. The level of demand that could be experienced cannot be predicted accurately based on available information. However, planning for the area should anticipate demand for a minimum of 20,000 sq. ft. of medical office floorspace during the next 5-10 years.

4.6 Retail Development Trends in Calgary

As shown in Table 6, annual retail expenditure from the "remaining City-wide" market segment is expected to increase by $508.7 million by the year 2006. This increase includes only expenditures for selected goods and services that are represented on 1st Avenue. Assuming an average productivity of $250 per sq. ft. for all stores city-wide that sell these types of goods and services an increase in annual expenditure of $508.7 million would warrant development of just over 2 million additional sq. ft. of retail floorspace in addition to what exists today.

The ability of 1st Avenue stores to continue to compete in this City-wide market and to maintain or increase its market share will depend on the ability of the commercial area to develop a unique retail identity and presence within the Calgary marketplace. Key competitive areas will continue to include the downtown area, regional shopping centres throughout the City, and well established inner City street retailing areas such as Kensington and 17th Avenue SW.

During 1991, regional shopping centres and fashion-oriented specialty retail areas were hurt by the recession and the first actual decline in total retail sales in recent years. In particular, fashion oriented retail outlets in areas such as the downtown, regional shopping centres and 17th Avenue SW have been experiencing poor sales, high vacancy rates and store closures.

General retail trends in Calgary provide a mix of signals which indicate movement toward an increasing variety of retail facilities in the City.

- Declining department store sales and realization of a potential limit on the increasing size and number of traditional regional shopping centres. Declining department store sales result in less mall traffic, thereby jeopardizing the viability of central retail units and the enclosed mall concept. Regional shopping centres have also been hurt by the trend to large volume discount warehouse retailers. Regional shopping centre managers are increasingly recognizing a need to differentiate their tenant mix from other centres. Increasingly they look to independent local merchants to achieve this differentiation.

  Increase in large, discount retail warehouse operations (Costco, Price Club) and "category killers" (Toys R Us, Future Shop, etc.). These are freestanding facilities that draw trade from throughout the City on the basis of large volume and low pricing. These operations are highly dependent on good automobile accessibility and are unencumbered by the obligations and costs associated with a location in a regional shopping centre.

- Increasing importance on "convenience." A greater variety of convenience-oriented stores and services from video rentals to camera shops, and shoe repair shops are successfully locating in neighbourhood centres and strip malls throughout the City. Consumers appear to be less willing to sacrifice the time involved in traveling long distances for regular convenience goods shopping.

A range of centralizing and decentralizing forces can be expected to be at work in the Calgary retail marketplace within the next decade. Trends toward increasing convenience may indicate an opportunity to serve the 1st Avenue local and hospital market segments. Trends toward increased specialization by independent stores based on price, product, or service quality may bode well for 1st Avenue's existing strengths. While large scale discount stores are currently growing, there will always be a demand for the high levels of personal service and product knowledge offered by smaller independent merchants. The current ascendency of discount warehouses can be expected to peak as consumer confidence in the economy returns from recent low levels.

1st Avenue stores and services will not compete successfully against large volume discount warehouse operations or food stores. Neither will they compete successfully on a City-wide basis with regional shopping centres and large established strips that contain a range of established fashion and furniture goods. The most appropriate merchandising strategy for 1st Avenue will build on existing strengths of the area and seek to reduce or eliminate weaknesses.

4.7 Strengths and Weaknesses of 1st Avenue NE

STRENGTHS

- service quality and friendliness
- ethnic/European atmosphere
- unique specialty food stores
- Italian restaurants
- Bow Valley Centre Hospital
- central location in City
- pedestrian street-orientation

WEAKNESSES

- amount/variety of retail
- lack of continuous frontage
- peak period parking congestion
- poor condition of streetscape
- uncoordinated operating hours
- lack of co-operation among merchants

Strengths

Service Quality and Friendliness
Merchants and shoppers agree that "service quality and friendliness" is a key strength of the business area. Many 1st Avenue businesses are already capitalizing on their potential to compete effectively with larger shopping centres and discount chain stores in terms of high-quality personalized service. It appears that significant improvements in service quality can still be made, however. Service quality was also rated as very poor by a significant number of shoppers interviewed.

Ethnic or European Atmosphere
Most 1st Avenue shoppers value the existing ethnic flavour of the area very highly. This atmosphere is provided by Italian-oriented food stores and restaurants, and by the design of a number of retail storefronts and facade treatments. In particular, the bakery and the Italian grocery have incorporated stucco facades with painted ethnic logos and scenes. Flags and wood trim detailing complete the European look provided by these buildings.

Unique Specialty Food Stores
The City Bakery, Italian Grocery, and Italian Gourmet deli, offer fresh food and specialty Italian food products that can be obtained in very few other locations in Calgary. These food outlets draw customers from throughout the City of Calgary without relying on linked hospital trips or local residents for a major portion of their business. In conjunction with the Italian restaurants, they provide a strong Italian image for the area and define 1st Avenue as

much more than a simple ad-hoc collection of hospital-related drugstores and local convenience stores.

Italian Restaurants

Restaurants on 1st Avenue include La Brezza, La Dolce Vita, and Pizza Maria's. La Brezza and La Dolce Vita are both owner-operated Italian specialty restaurants providing licensed dining. These restaurants, like the Italian food stores in the area attract customers from throughout the City and do not cater exclusively to the local population of employees or residents. Their physical presence on 1st Avenue reinforces the Italian flavor of the street.

Bow Valley Centre Hospital

The Bow Valley Centre (BVC) Hospital is one of the City's largest employers with 3300 full and part-time staff. In addition, the hospital serves in-patients and outpatients from throughout the City of Calgary and southern Alberta. The BVC provides the primary market base for existing medical offices and pharmacy outlets on 1st Avenue. The BVC's location in the heart of the 1st Avenue commercial area provides excellent exposure to hospital users for 1st Avenue businesses. With anticipated growth in the number of visitors and outpatients, the BVC provides a growing potential market for a full range of goods and services on 1st Avenue.

Central Location in City

The 1st Avenue business area just minutes northeast of the Calgary downtown area. It benefits from the same easy accessibility from all parts of the City that characterizes the Calgary downtown area. Memorial Drive and Edmonton Trail provide convenient connections to Calgary's City-wide freeway system. This central and easily accessible location means that 1st Avenue businesses can attract customers from throughout the City.

Pedestrian Scale and Orientation

Virtually all existing commercial buildings on 1st Avenue provide a pedestrian scale frontage and sidewalk orientation. The pedestrian atmosphere is valued by consumers as a key part of the European or ethnic atmosphere of the area. This traditional shopping atmosphere can be expected to become an increasingly rare competitive advantage in the future.

Weaknesses

Variety of Goods and Services

Those who currently shop on 1st Avenue tend to visit the area to purchase a particular type of product or visit a particular type of store. This single-purpose shopping function limits the potential for all businesses to increase their sales to people who are already shopping in the area. The commercial area does not have a sufficient number or variety of businesses to encourage shoppers to stroll and comparison shop.

Non-Continuous Retail Frontage

A small amount of existing retail floorspace is spread over more than 6 blocks of frontage. This lack of a consolidated focus and the relatively large distance between stores discourages shoppers from browsing or visiting more than one specific store. The BVC surface parking lot is the major visual factor on 1st Avenue, encompassing 4 blocks of frontage in the centre of the business area. The separation between stores works against the valuable pedestrian orientation of existing businesses.

Parking Congestion at Peak Periods

The relatively low level of commercial floorspace on 1st Avenue ensures that parking is not a problem for shoppers during most of the day. However, shoppers do find parking to be inconvenient during peak shopping periods, weekday noon hours in particular. Lack of parking can be expected to become a constraint to growth unless future commercial and hospital expansion in the area provide parking stalls sufficient to meet their requirements.

Poor Condition of Streetscape

Approximately 23% of on-street shoppers and hospital users interviewed indicated that they would likely shop more often on 1st Avenue if improvements to the public streetscape were undertaken (sidewalks, streetlights, benches). A "European Village" design theme for the upgrading of private building facades was identified as one of the most effective possible business improvements for increasing shopping frequency.

Uncoordinated Operating Hours

1st Avenue shoppers are generally satisfied with the current operating hours of stores. However, one of the most frequent "open-ended" survey responses was a concern about "uncoordinated" hours of operation. As noted previously in this report, drugstores are closed on Saturday, and restaurants are often closed during the day on weekdays. Other retail stores close in the early evening when restaurants are open. This lack of coordinated hours reduces the amount and range of retail activity in the area at any particular time of day.

Coordination Among Merchants

The relatively small number of merchants on 1st Avenue serve a broad range of different target markets. This factor makes it difficult for merchants to cooperate to increase business levels in the area as a whole. There is considerable lack of certainty about the most effective means to improve business in the area. Medical office practitioners are willing to participate and to contribute toward business area improvements. Some retailers are unwilling at this time to consider coordinated initiatives. In the absence of a coordinated improvement strategy and cooperation among retailers, it is likely that the area will continue to function as an ad-hoc group of functionally separate businesses in the future.

4.8 Recommended Market Orientation

In order to successfully attract new shoppers and retail stores to 1st Avenue NE, business improvement initiatives should be undertaken that are carefully targeted to the available market opportunities. The identification of a preferred "market orientation" for 1st Avenue businesses will assist in selecting improvement programs. A preferred market orientation is determined by examining current market strengths, market growth areas, and existing and future competition. By establishing an agreed-upon "market-orientation" for the 1st Avenue business area, individual businesses can invest in improvements – both individually and potentially as a group – that will support the preferred market orientation and thereby assist in improving overall business conditions.

The recommended market orientation for 1st Avenue is based on the following "two-pronged" approach:

1. Strengthen the existing specialty/ethnic food and restaurant mix that makes 1st Avenue unique and already draws effectively from the City-wide trade area.
2. Increase the range of services and convenience goods that are targeted specifically to the hospital-based market.

This dual market orientation will build on the two main strengths of the current business area: the City-wide market draw of existing specialty food outlets and restaurants; and the presence of a growing major institution on 1st Avenue that draws staff and visitors from throughout the City and southern Alberta.

The City-Wide Market Orientation

Additional specialty food stores and a broader range of restaurants could strengthen the image of 1st Avenue as a permanent, year-round, European, street-oriented, food shopping area. The future market share potential will depend on the ability of 1st Avenue to continue to provide a product to the consumer that is unique and different from the standard forms of retail competition which exist throughout the City. This differentiation will also be necessary to capture a greater share of the growing hospital-based market.

The Hospital-Based Market Orientation

The second component of the recommended dual market orientation provides the largest potential for growth in sales and retail floorspace on 1st Avenue. To successfully realize the growth potential from the hospital-based market, a coordinated marketing program will be required (co-ordinated promotions and advertising targeted to hospital users). Hospital users are busy people who have shopping options available closer to their home. They will need to be made aware of the unique nature of the products, services, and prices on 1st Avenue. Note that the hospital market orientation will also serve to increase the range of goods and services that are available to local residents of Bridgeland-Riverside and employees of other institutions in the immediate area.

The following types of new stores and services can be expected to address the anticipated market opportunity and complement the existing mix of businesses on 1st Avenue.

- Casual restaurants, smaller ethnic restaurants, coffee shops, donut shops will cater to the hospital-based and the City-wide specialty food markets.
- Additional specialty food stores including, for example, a butcher shop, health food store, candy and chocolate store, or new European/ethnic foods will cater to the hospital-based and City-wide specialty food markets.
- Durable and semi-durable goods stores such as culinary arts supplies or a bookstore with specialization in foods/cookbooks, stationery and gift stores, toy and hobby stores, or other ethnic specialty goods will complement the specialty food function of the area and diversify the range of goods offered to the hospital-based market.
- Personal services such as barbers/hairdressers, dry cleaning, post office, or health club, will expand and/or diversify the range of services available to the hospital-based market.

On-street interviews with shoppers and in-hospital interviews with staff, patients and visitors indicate that there is currently a significant demand for new floorspace in the first two categories (casual restaurants and additional specialty foods). On the other hand, growth in personal and other convenience service floorspace would only be warranted following significant growth in the area's specialty food function, or following implementation of a coordinated marketing program to improve the area's current share of the hospital-based market.

In future, additional specialty food stores and a broader range of restaurants will present the opportunity to market 1st Avenue as a permanent year-round ethnic street-oriented food festival area. Successful growth in this market orientation will, in turn, support a range of general goods and services outlets. The second opportunity presented is that of creating an integrated interface between the hospital and the adjoining community. By successfully combining a major hospital activity generator with a specialty food and restaurant retail area, a very distinctive and unique destination shopping area could well be achieved.

4.9 Improvement Programs and Retail Floorspace Growth

Three possible scenarios or business improvement "programs" have been prepared for consideration by the 1st Avenue Business Association. The recommended market orientation does not vary under any of the programs. The three programs vary mainly in the amount of effort and resources devoted to implementation of business improvement initiatives. Recommended improvement initiatives are summarized based on findings of the survey research undertaken during the study. Each recommended improvement initiative will have some positive effect in terms of increasing sales and market share for 1st Avenue businesses. Estimates of realistic market share growth are provided for each of the three program options. This market share growth is translated into increased sales in dollars and the corresponding amount of new retail floorspace (in square feet) that could be supported on 1st Avenue.

Low-Growth Program

The Low-Growth Program assumes that only one key improvement initiative is undertaken by 1st Avenue businesses.

1. Public streetscape improvements are undertaken which provide upgraded sidewalks along with new trees, benches and streetlights.

A public streetscape improvement program for 1st Avenue need not and should not be "gold-plated." Shoppers appreciate and value the existing ethnic atmosphere on 1st Avenue. The Avenue needs to be unified and cleaned up rather than totally changed. A moderate cost streetscape improvement program is recommended for the following reasons:

- To retain market share in a competitive marketplace. Shopping centre owners have recognized a need to physically renovate and renew their centres every 8 to 10 years simply to retain existing market share and lease rates.
- To unify and protect the increasingly rare "street shopping" atmosphere that exists today on 1st Avenue. This "strength" will become increasingly valuable in future years within the highly competitive Calgary retail marketplace.

- To provide early physical evidence of successful revitalization. The literature suggests that the early momentum provided by successful public streetscape improvements can stimulate coordinated private initiatives in areas such as facade improvements, advertising, and new business recruitment. These coordinated follow-up initiatives will be necessary to increase market share and thereby improve the variety of merchants, the continuity of retail frontage, and the pedestrian-oriented comparison shopping atmosphere.

Table 9 provides an estimate of changes in market share, retail sales, and warranted retail floorspace that could be expected under the Low-Growth Program during the 1991 to 2006 period. In the absence of any other business improvement initiatives, public streetscape improvements can be expected to result in modest increases in overall sales levels for existing businesses. However, it is unlikely that streetscape improvements alone can maintain the area's current share of the growing City-wide market through the next 10 to 15 years. Losses in City-wide "market share" are likely to occur due to increased competition from other areas of the City.

Under the Low-Growth Program, the study area share of the local and hospital markets is expected to remain stable at current levels during the 1991 to 2006 period. The share of the remaining City-wide market is expected to decline slightly from the current estimated level of 0.16% to 0.13% by the year 2006 (see Table 9). Overall, total annual retail sales by 1st Avenue businesses under this Program would increase from $5,391,100 in 1991 to $7,190,500 in 2006 (an increase of approximately $1,800,000 per year or 33% over 1991 levels). Assuming an average productivity level of $300 per sq. ft. for stores on 1st Avenue, this increase in total sales would warrant development of approximately 6,000 sq. ft. of additional retail floorspace by the year 2006.

The majority of this increase in sales will be attributable to growth in the hospital-related market. This is a high growth market for 1st Avenue businesses due to their physical proximity to a high rate of patient and visitor growth at the hospital.

An initial 3,000 sq. ft. of new retail floorspace would be warranted by 1996. Ideally, this initial increase in floorspace will be accommodated within the existing commercial policy area as defined in the Bridgeland-Riverside Area Redevelopment Plan (ARP). Most of the remaining 3,000 sq. ft. of warranted retail floorspace growth would occur by 2001 in conjunction with growth in the number of hospital visitors and outpatients. It is possible that all 6,000 sq. ft. of new retail floorspace could be accommodated within the existing commercial policy area, assuming that existing underutilized 1st Avenue frontage sites are redeveloped, and assuming that reasonably efficient commercial lot assembly and development patterns are realized (see Map 3).

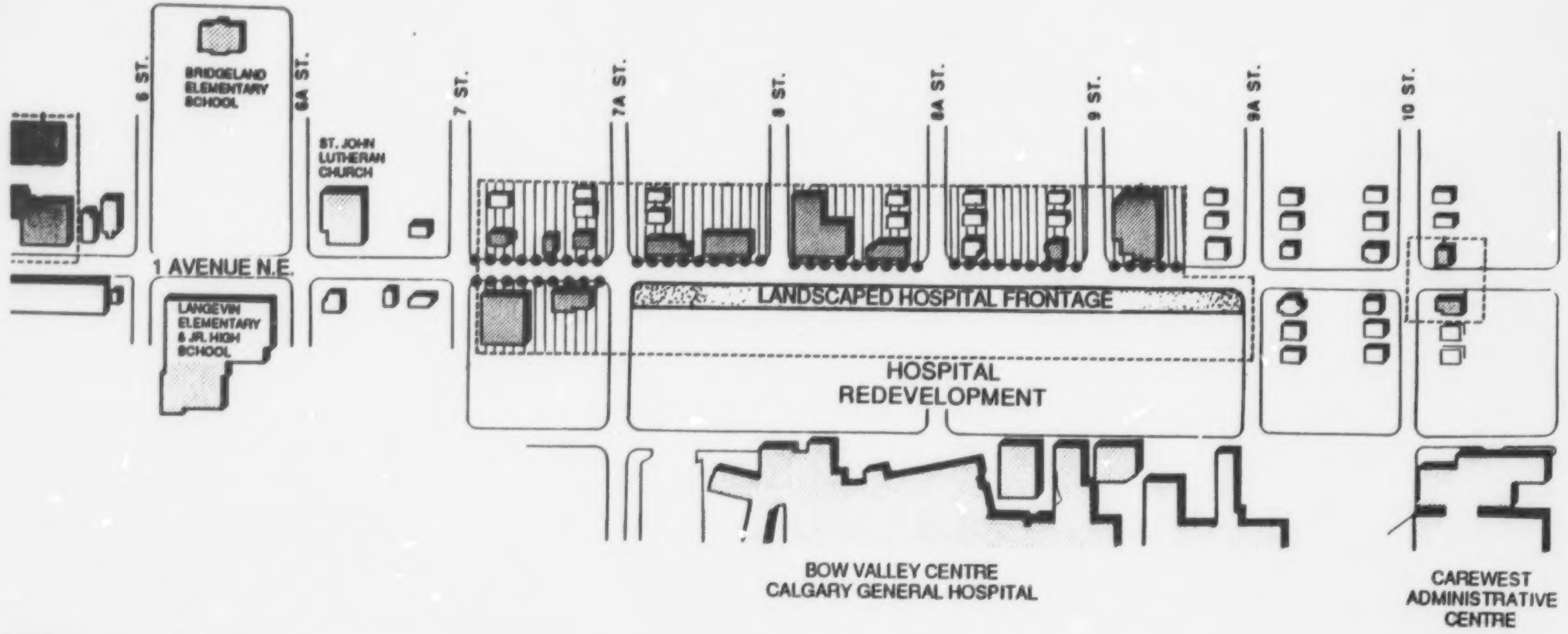
Table: 9:

WARRANTED RETAIL FLOORSPACE: LOW-GROWTH PROGRAM

	1991	1996	2001	2006
LOCAL RESIDENT MARKET				
Expenditure ($000's) (2)	$8,451.6	$8,857.3	$9,296.3	$9,823.1
1st Ave. Low-Growth Share	14.2%	14.2%	14.2%	14.2%
1st Ave. Potential ($000's)	$1,200.1	$1,257.7	$1,320.1	$1,394.9
Increase in Annual Sales/1991-2006 ($000's)				$194.8
HOSPITAL BASED MARKET				
Expenditure ($000's) (2)	$27,575.0	$38,605.0	$49,635.0	$49,635.0
1st Ave. Low-Growth Share	6.35%	6.35%	6.35%	6.35%
1st Ave. Potential ($000's)	$1,751.0	$2,451.4	$3,151.8	$3,151.8
Increase in Annual Sales/1991-2006 ($000's)				$1,400.8
REMAINING CITY-WIDE MARKET				
Expenditure ($000's) (2)	$1,524,963.7	$1,707,346.9	$1,857,906.4	$2,033,724.6
1st Ave. Low-Growth Share	0.16%	0.15%	0.14%	0.13%
1st Ave. Potential ($000's)	$2,439.9	$2,561.0	$2,601.1	$2,643.8
Increase in Annual Sales/1991-2006 ($000's)				$203.9
TOTAL 1st AVE. POTENTIAL ($000's) (total of expenditure potential from each market segment)	$5,391.1	$6,270.2	$7,073.0	$7,190.5
AVERAGE PRODUCTIVITY (Sales/Sq.Ft.)	$300	$300	$300	$300
WARRANTED FLOORSPACE (Sq.Ft.) (expenditure potential divided by estimated average productivity)	17,970	20,901	23,577	23,968
EXISTING FLOORSPACE	17,900	17,900	17,900	17,900
WARRANTED ADDITIONAL FLOORSPACE	70	3,001	5,677	6,068

1 The Low-Growth Program seeks to maintain existing share of a growing market base through moderate public streetscape improvements. No other coordinated initiatives are undertaken.

2 Total expenditure at types of stores/services currently represented on 1st Avenue. See Table 6.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▨ EXPANSION OF COMMERCIAL AREA

▦ HOSPITAL FRONTAGE DEVELOPMENT

●●●●●● PUBLIC STREETCAPE IMPROVEMENTS

- - - - - - EXISTING COMMERCIAL AREA BOUNDARY

◌ ULTIMATE FOCUS OF COMMERCIAL AREA

ANTICIPATED RETAIL FLOORSPACE GROWTH

TO 1996	3,000 SF	INFILL
1997 - 2001	2,500 SF	INFILL
2002 - 2006	500 SF	INFILL
TOTAL	6,000 SF	

MAP 3:

LOW- GROWTH PROGRAM

PUBLIC STREETSCAPE IMPROVEMENTS ONLY

Medium-Growth Program

The "Medium-Growth" Program assumes that public streetscape improvements are supplemented with the following subsequent initiatives:

1. adoption of an agreed-upon market orientation by the business association;
2. formation of a Business Revitalization Zone for purposes of adopting and implementing a coordinated marketing program targeted to the hospital-based market segment;
3. gradual, ongoing private improvements to facades that are consistent with the European Village design guidelines contained in the Bridgeland-Riverside Area Redevelopment Plan; and
4. landscaped setback area on the 1st Avenue hospital frontage.

Coordinated and consistent marketing (advertising and promotion) and physical improvements to private facades would effectively build on momentum established by public streetscape improvements. A major objective of the Medium-Growth Program (and the High-Growth Program) should be to capture a higher share of the growing hospital-based market. Formation of a Business Revitalization Zone is recommended if 1st Avenue businesses choose to proceed beyond the Low Growth Program (basic public streetscape improvements) toward any program which seeks an increased share of the growing hospital-based retail market segment.

A Business Revitalization Zone (BRZ) designation would allow funds to be collected by the City from all businesses located within the commercial area. These member businesses should include medical offices and the Bow Valley Centre hospital. These funds would then be transferred to an elected BRZ Board of Directors for use in support of BRZ marketing and other cooperative programs. The key to success in these programs will be the BRZ's ability to coordinate individual business efforts, rather than the size of the BRZ budget.

In the consultant's opinion, it is unlikely that coordinated and consistent marketing to the hospital-based market segment can occur in the absence of a BRZ type of organizational structure. On the other hand, coordination of a portion of the existing advertising budgets of all businesses through a BRZ levy, could have a large impact when targeted to attract the hospital-based market. A secondary emphasis is recommended for coordinated joint-marketing of specialty food and restaurant outlets to the City-wide market. A portion of this City-wide advertising can continue to be undertaken independently by the specialty food store and restaurant owners that most directly benefit.

Table 10 provides an estimate of changes in market share, retail sales, and warranted retail floorspace that could be expected under the Medium-Growth Program during the 1991 to 2006 period. The 1st Avenue share of selected expenditures from the hospital-based market is projected to grow from the current estimated level of 6.3% to 8.5% by 2006. The 1st Avenue share of selected retail expenditures from the remaining City-wide market segment is projected to grow from the current estimated 0.16% to 0.22% by 2006.

Total annual sales under the Medium-Growth Program increase from $5,391,100 in 1991 to $10,166,600 in 2006, representing an increase in sales of just over $4,775,000 per year or 88% over 1991 levels. Assuming an average productivity level (sales per sq. ft. in 1991 dollars) of $300, this increase in sales would warrant development of approximately 16,000 sq. ft. of additional retail floorspace by the year 2006.

With implementation of a coordinated marketing program that includes both the primary hospital-based target market and the City-wide target market segment, it is expected that growth in sales will be derrived predominantly from the hospital-based market (52%). However, a very significant proportion of new sales growth (43%) is also anticipated to be derived from the remaining City-wide market segment that is not linked to the hospital.

An initial 8,000 sq. ft. of new retail floorspace should be warranted by 1996 based on streetscape improvements undertaken during 1993 and a coordinated marketing program commencing in 1994. The majority of the remaining floorspace growth would occur between 1996 and 2001 in conjunction with growth in the hospital-based market. Beyond 2001, growth is expected to slow as hospital growth is capped, and as 1st Avenue reaches a competitive threshold relative to other specialty food shopping areas throughout the City.

Under the Medium-Growth Program, expansion of the commercial policy area (i.e. residential to commercial rezoning and Bridgeland-Riverside ASP policy amendment) would be required during the 1992 to 1996 period to accommodate anticipated growth in retail floorspace (see Map 4).

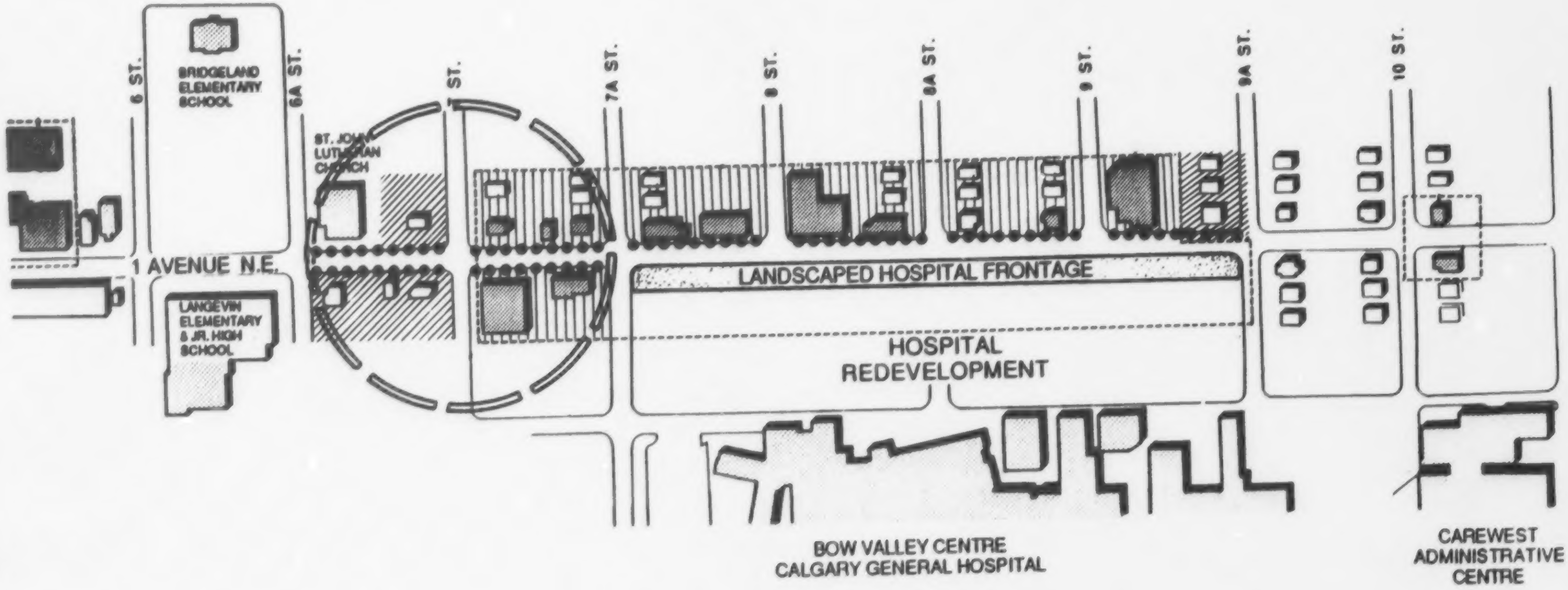
Table 10:

WARRANTED RETAIL FLOORSPACE: MEDIUM-GROWTH PROGRAM

	1991	1996	2001	2006
LOCAL RESIDENT MARKET				
Expenditure ($000's) (2)	$8,451.6	$8,857.3	$9,296.3	$9,823.1
1st Ave. Medium-Growth Share	14.2%	15.0%	15.0%	15.0%
1st Ave. Potential ($000's)	$1,200.1	$1,328.6	$1,394.4	$1,473.5
Increase in Annual Sales/1991-2006 ($000's)				$273.3
HOSPITAL BASED MARKET				
Expenditure ($000's) (2)	$27,575.0	$38,605.0	$49,635.0	$49,635.0
1st Ave. Medium-Growth Share	6.35%	8.00%	8.50%	8.50%
1st Ave. Potential ($000's)	$1,751.0	$3,088.4	$4,219.0	$4,219.0
Increase in Annual Sales/1991-2006 ($000's)				$2,468.0
REMAINING CITY-WIDE MARKET				
Expenditure ($000's) (2)	$1,524,963.7	$1,707,346.9	$1,857,906.4	$2,033,724.6
1st Ave. Medium-Growth Share	0.16%	0.20%	0.22%	0.22%
1st Ave. Potential ($000's)	$2,439.9	$3,414.7	$4,087.4	$4,474.2
Increase in Annual Sales/1991-2006 ($000's)				$2,034.3
TOTAL 1st AVE. POTENTIAL ($000's) (total of expenditure potential from each market segment)	$5,391.1	$7,831.7	$9,700.8	$10,166.6
AVERAGE PRODUCTIVITY (Sales/Sq.Ft.)	$300	$300	$300	$300
WARRANTED FLOORSPACE (Sq.Ft.) (expenditure potential divided by estimated average productivity)	17,970	26,106	32,336	33,889
EXISTING FLOORSPACE	17,900	17,900	17,900	17,900
WARRANTED ADDITIONAL FLOORSPACE	70	8,206	14,436	15,989

1 The Medium-Growth Program seeks to increase market share through BRZ organization and implementation of coordinated joint-marketing initiatives.

2 Total expenditure at types of stores/services currently represented on 1st Avenue. See Table 6.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●●●●●● PUBLIC STREETCAPE IMPROVEMENTS

------- EXISTING COMMERCIAL AREA BOUNDARY

◌ ULTIMATE FOCUS OF COMMERCIAL AREA

ANTICIPATED RETAIL FLOORSPACE GROWTH

BY 1996	8,000 SF	INFILL & EXPANSION
1997 - 2001	6,500 SF	INFILL & EXPANSION
2006	1,500 SF	INFILL & EXPANSION
TOTAL	16,000 SF	

MAP 4:

MEDIUM - GROWTH PROGRAM

PUBLIC STREETSCAPE IMPROVEMENT
COORDINATED MARKETING
(NO HOSPITAL FRONTAGE DEVELOPMENT)

High-Growth Program

The "High-Growth" Program illustrates sales growth that could be achieved by 1st Avenue businesses with implementation of a full package of effective business improvement initiatives. The key difference between the High Growth and the Medium-Growth Program is the availability of the 1st Avenue hospital frontage lands for at-grade retail development.

Retail development on the 1st Avenue hospital frontage would provide a consolidated central focus of commercial activity on 1st Avenue. It would maximize the potential for efficient shared-use of hospital parking stalls with neighbouring businesses. It would also provide an increased level of service to hospital staff and visitors that would, in turn, tend to support an increased share of the hospital market for 1st Avenue businesses. Therefore, retail development on the 1st Avenue hospital frontage is not regarded simply as another option for accommodating growth. Rather, it is regarded as a key improvement initiative for the 1st Avenue business area which will affect not only the distribution of new floorspace, but also the total amount of warranted floorspace.

Table 11 provides an estimate of changes in market share, retail sales, and warranted retail floorspace that could be expected under the High-Growth Program during the 1991 to 2006 period. As shown in Table 11, the 1st Avenue share of all market segments can be expected to increase under the High-Growth Program. The "local resident" market share could conservatively be expected to increase from the current estimated level of 14.2% to a level of at least 15%. Share of the hospital market segment could increase from the current estimated 6.35% to a level of 8.5% by 1996 and 10% by the year 2001 with development of retail floorspace on the 1st Avenue hospital frontage. Achievable share of the City-wide market segment for selected goods and services could grow from the current estimated level of 0.16% to an ultimate level of 0.25% by 2001 with full implementation of all improvement initiatives.

Total annual sales under the High-Growth Program increase from $5,391,100 in 1991 to $11,521,300 in 2006, representing an increase of just over $6,130,000 or 114% over 1991 levels. Assuming an average productivity level of $300 per sq. ft. for stores in the study area, this increase in total sales would warrant development of approximately 20,500 sq. ft. of additional retail floorspace by the year 2006. New sales growth would be derrived from the hospital-based and the City-wide target market segments in similar proportions to the Medium-Growth Program (52% and 43% respectively). A slightly higher proportion of sales is from the hospital-based market due to the increased integration of retail floorspace with the hospital.

Under the High-Growth Program an initial 9,000 sq. ft. of new retail floorspace should be warranted on 1st Avenue by 1996, assuming that at least 5,000 sq. ft. of this floorspace is provided on the 1st Avenue hospital frontage during this period. Alternatively, up to 9,000 sq. ft. of market retail floorspace could be accommodated on the hospital frontage by 1996 if no allowance is provided for infilling of the existing commercial area during this period.

The initial stage of hospital frontage development should occur at the northwest corner of the hospital site in order to reinforce the traditional retail focus of the 1st Avenue business area. Ultimately, 10,000 - 15,000 sq. ft. of retail floorspace could be accommodated on the hospital frontage. This amount of floorspace would still allow a large portion of the hospital frontage on 1st Avenue to be landscaped as open space. Most of the remaining growth in retail floorspace through the year 2006 (5,500 to 10,500 sq. ft.) could be accommodated within the existing commercial policy area (see Map 5).

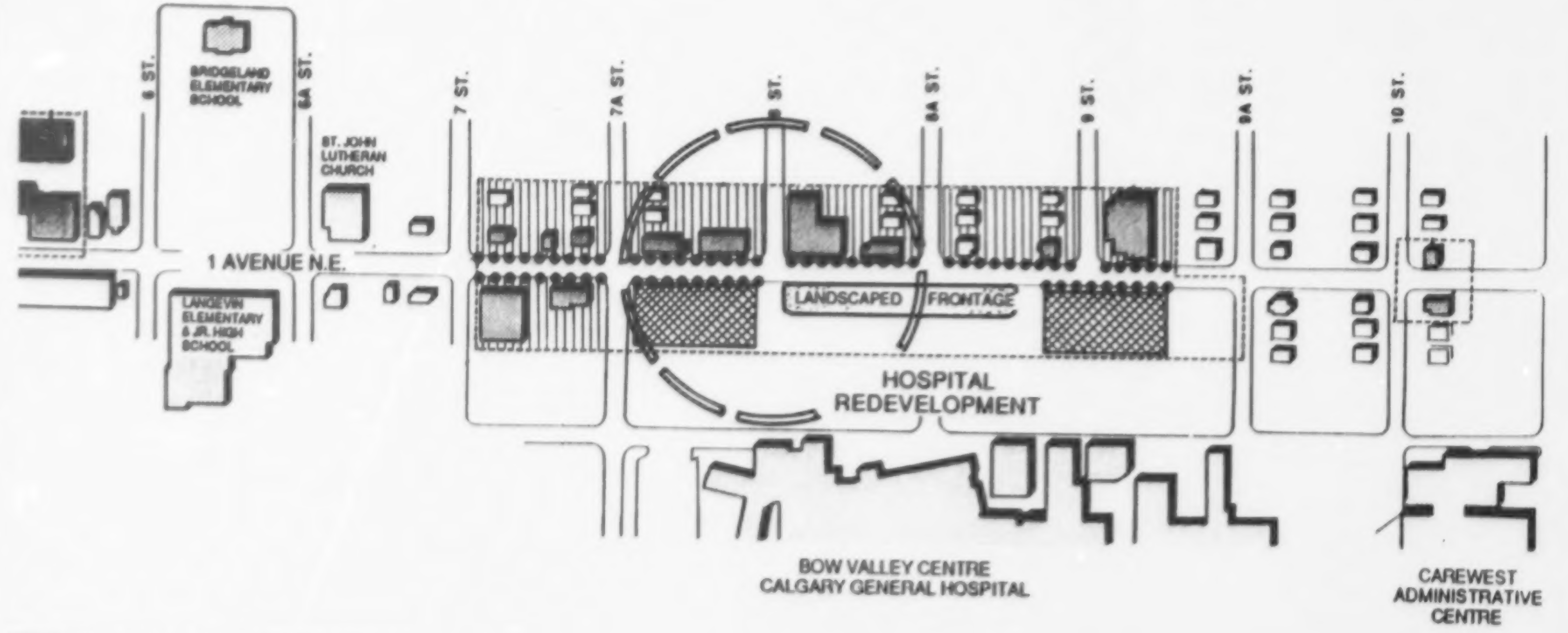
Depending on the timing and amount of retail floorspace that is actually provided on the 1st Avenue hospital frontage, some minor expansion of the existing ASP commercial policy area could be required. It is reasonable to expect that floorspace growth would stabilize after 2001 as hospital growth stabilizes and the competitive potential of 1st Avenue's specialty function within the City-wide marketplace is achieved.

Table 11:
WARRANTED RETAIL FLOORSPACE: HIGH-GROWTH OPTION

	1991	1996	2001	2006
LOCAL RESIDENT MARKET				
Expenditure ($000's) (2)	$8,451.6	$8,857.3	$9,296.3	$9,823.1
1st Ave. High-Growth Share	14.20%	15.00%	15.00%	15.00%
1st Ave. Potential ($000's)	$1,200.1	$1,328.6	$1,394.4	$1,473.5
Increase in Annual Sales/1991-2006 ($000's)				$273.3
HOSPITAL BASED MARKET				
Expenditure ($000's) (2)	$27,575.0	$38,605.0	$49,635.0	$49,635.0
1st Ave. High-Growth Share	6.35%	8.50%	10.00%	10.00%
1st Ave. Potential ($000's)	$1,751.0	$3,281.4	$4,963.5	$4,963.5
Increase in Annual Sales/1991-2006 ($000's)				$3,212.5
REMAINING CITY-WIDE MARKET				
Expenditure ($000's) (2)	$1,524,963.7	$1,707,346.9	$1,857,906.4	$2,033,724.6
1st Ave. High-Growth Share	0.16%	0.20%	0.25%	0.25%
1st Ave. Potential ($000's)	$2,439.9	$3,414.7	$4,644.8	$5,084.3
Increase in Annual Sales/1991-2006 ($000's)				$2,644.4
TOTAL 1st AVE. POTENTIAL ($000's) (total of expenditure potential from each market segment)	$5,391.1	$8,024.7	$11,002.7	$11,521.3
AVERAGE PRODUCTIVITY (Sales/Sq.Ft.)	$300	$300	$300	$300
WARRANTED FLOORSPACE (Sq.Ft.) (expenditure potential divided by estimated average productivity)	17,970	26,749	36,676	38,404
EXISTING FLOORSPACE	17,900	17,900	17,900	17,900
WARRANTED ADDITIONAL FLOORSPACE	70	8,849	18,776	20,504

1 The High-Growth program seeks increased market share through coordinated streetscape and marketing initiatives along with development of retail floorspace on the 1st Avenue hospital frontage.

2 Total expenditure for types of stores/services currently represented on 1st Avenue. See Table 6.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●●●●●● PUBLIC STREETCAPE IMPROVEMENTS

-------- EXISTING COMMERCIAL AREA BOUNDARY

◯ ULTIMATE FOCUS OF COMMERCIAL AREA

ANTICIPATED RETAIL FLOORPLACE GROWTH

BY 1996	9,000 SF	INFILL& HOSPITAL
1997 - 2001	9,500 SF	INFILL& HOSPITAL
2002 - 2006	2,000 SF	INFILL & HOSPITAL
TOTAL	20,500 SF	

MAP 5:

HIGH- GROWTH PROGRAM

PUBLIC STREETSCAPE IMPROVEMENT
COORDINATED MARKETING
HOSPITAL FRONTAGE DEVELOPMENT

4.10 Other Findings and Recommendations

Recommended Business Area Improvement Program

The "High-Growth" program as outlined in this report is a realistic improvement strategy for 1st Avenue that has benefits for existing merchants and medical offices within the study area, the Bow Valley Centre Hospital, other institutions in the area, and existing Bridgeland-Riverside residents. Key elements of a High-Growth business improvement program for 1st Avenue should include the following:

1. moderate-cost public streetscape improvements
2. Business Revitalization Zone designation
3. development of retail floorspace on 1st Avenue hospital frontage
4. coordinated and consistent advertising program (hospital users and specialty foods)
5. targeted promotions and sales events (hospital users and specialty foods)
6. implementation of private improvements which reinforce the European Village streetscape theme
7. shared use parking management and signage
8. some coordination of operating hours

Development of street-oriented retail floorspace on the hospital frontage will be required to achieve the full potential of the commercial area. Any number of hospital-based clinical, research and/or administration functions could be located on the upper level (or part of the main level) of this street-front space in addition to market commercial activities. Landscaped open space on the hospital frontage will contribute to the function of the commercial area and to the Bridgeland-Riverside neighbourhood if it is relatively compact and surrounded by hospital and commercial activity-generating uses.

Zoning and Land Use

The existing C-1 Local Commercial District will provide for an appropriate intensity of streetfront retail development on 1st Avenue. However, new uses on 1st Avenue should not be restricted to local or convenience retail uses. Major expansion of the ARP commercial policy area could be required under the Medium-Growth program outlined in this report. Minor expansion of the existing commercial policy area may be required under any of the three growth programs if lots cannot be consolidated for reasonably efficient commercial development.

To ensure continued reinforcement of the existing character and function of the commercial area, all new commercial development should front onto 1st Avenue and surface parking should generally be located to the rear or side of commercial buildings. Within the designated commercial area, efficient parcel consolidation and development should be encouraged to minimize the ultimate need for expansion of the commercial area. To facilitate the efficient conversion from residential to commercial use, consideration could be given to permitting certain transitional uses on parcels that front onto side streets within the commercial policy area. Such uses could include home occupations/offices in existing dwellings, and well-landscaped surface parking areas.

Office Development

Any significant demand for office floorspace on 1st Avenue will be for medical offices associated directly or indirectly with the Bow Valley Centre hospital. In the medium to longer term (5-15 years) there is likely to be demand for at least 20,000 sq. ft. of medical office floorspace.

Anticipated demand for new medical office floorspace on 1st Avenue may require a relatively large commercial building comparable to existing 3-storey medical office buildings on 1st Avenue. The need for associated medical services to cluster, the need for elevator access to upper floors for patients, the need for close proximity to the hospital, and the need to compete with existing medical buildings, will drive the market for medical office space. These needs can best be met by a relatively large, elevator-serviced building with underground parking. Any rezoning to accommodate a medical office building should ensure that continuous retail floorspace is provided at street level frontages.

One option for the provision of a new medical office building on 1st Avenue would be construction of a "cooperative" building on the hospital frontage land. A cooperative building – similar to the existing Bridgeland Medical Building at the corner of 1st Avenue and 7th Street – would be owned and operated by doctors, many of whom would operate their own practice from the building. This type of doctors' cooperative could be pre-sold and designed specifically to suit tenant requirements, thereby minimizing the risk that is often associated with speculative office development.

Residential Development

The upper floors of commercial buildings on 1st Avenue may accommodate a limited demand for general office space (law firms, insurance, etc) and/or commercial recreation, health and education facilities. Alternatively, upper floors could accommodate residential units designed for single person households and hospital employees. Demand for new residential units over stores has not been tested in Calgary. However, many of the characteristics of 1st Avenue NE such as proximity to downtown, proximity to a major employment generator, proximity to stores and services, proximity to transit, and location on a commercial road with reasonably slow/safe/quiet traffic

levels, appear to be suited to the development of reasonably affordable, small housing units over stores.

Traffic Implications

The addition of approximately 20,000 sq. ft. of new retail floorspace over 10 to 15 years can be expected to add approximately 700 vehicle trips per day to existing traffic levels on 1st Avenue (after deducting for shopping/hospital linked trips). This represents an increase of 6% over existing 1st Avenue traffic levels of approximately 11,000 vehicles per day in the vicinity of the hospital. Future growth in hospital traffic will be dispersed relatively evenly throughout the day. Therefore, traffic levels on 1st Avenue can be expected to remain well within the physical capacity of the roadway. Closure of residential roadways adjacent to 1st Avenue should not be required to restrict non-residential through-traffic.

Parking On 1st Avenue NE

Existing parking on 1st Avenue is near capacity. Parking is adequate throughout most of the day but becomes inconvenient for customers of local businesses during the noon hour peak period. Therefore, existing by-law parking requirements should be enforced for new retail and specialty food stores.

Restaurants should be permitted to provide a proportion of their parking requirement off-site. In addition, a relaxation of current parking stall requirements should be permitted for small restaurants that will draw a high proportion of their mid-day trade from the hospital, other institutions in the area, or the general pedestrian traffic in the area. Existing restaurants draw the majority of their customers during the supper and evening hours. The Bow Valley Centre has excess parking capacity during the late afternoon and evening hours that can be shared with local restaurants. The hospital is prepared to work with area businesses to ensure convenient availability of excess hospital stalls during these periods.

Business Revitalization Zone

Formation of a Business Revitalization Zone is recommended if 1st Avenue businesses choose to proceed beyond the Low-Growth program (basic public streetscape improvements) toward any program which seeks an increased share of the growing hospital-based retail market potential. A Business Revitalization Zone (BRZ) designation would allow funds to be collected by the City from all businesses located within the business area. These member businesses should include medical offices and the Bow Valley Centre hospital. These funds would then be transferred to an elected BRZ Board of Directors for use in support of BRZ marketing and other cooperative programs. The key to success in these programs will be the BRZ's ability to coordinate individual business efforts, rather than the size of the BRZ budget.

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In the consultant's opinion, it is unlikely that coordinated and consistent marketing to the hospital-based market segment can occur in the absence of a BRZ type of organizational structure.

City of Calgary Role
The City of Calgary has a significant stake in the preservation and enhancement of older commercial areas. This market study confirms that 1st Avenue provides a small but solid existing economic base and retail function within the City. Growth and revitalization of the 1st Avenue business area will support growth in inner-city property and building assessment values. It will complement and enhance the Bridgeland-Riverside neighbourhood. It has the potential to provide a unique urban environment which integrates specialty food shopping and ethnic restaurants with a major City and regional institution – the Bow Valley Centre hospital.

Given the limited number of existing businesses on 1st Avenue and their corresponding lack of organizational resources, The City of Calgary should continue to provide organizational and planning support to the 1st Avenue Business Association as it pursues specific business improvement initiatives which might include the formation of a BRZ organization. It is not expected that 1st Avenue BRZ budgets would permit the hiring of regular support staff. Therefore, formal support provided by City staff (facilitation, secretarial, general support and advice on precedents and options) would be invaluable until the business group can operate independently.

While the City can provide organizational support and assistance, the momentum for improvement action must be generated and sustained from within the business community itself. The business association should also continue its ongoing dialogue with both the Bow Valley Centre hospital and the Bridgeland-Riverside community. Most – if not all – successful street retailing areas maintain a close cooperative relationship with their local market base. This local market segment is a key to long-term stability since it is not as subject to changing City-wide retail trends and competitive forces as other market segments.

APPENDIX A:
MERCHANT QUESTIONNAIRE

1st AVENUE N.E. BUSINESS SURVEY
DECEMBER 1991

THANK YOU FOR YOUR PARTICIPATION IN THIS SURVEY. LEAVE THE COMPLETED QUESTIONNAIRE NEAR THE RECEPTION/SALES AREA OF YOUR COMPANY FOR PICK-UP BY A WALKER BROWN URBAN CONSULTANTS LTD. REPRESENTATIVE NEXT WEEK (FRIDAY DECEMBER 13, 1991).

WE KNOW THAT THIS IS A BUSY TIME OF YEAR FOR MOST BUSINESS PEOPLE. IF YOU PREFER, PLEASE MAIL THE COMPLETED QUESTIONNAIRE TO WALKER BROWN URBAN CONSULTANTS LTD. AT SUITE 200, 215 - 10 AVENUE S.W., CALGARY, ALBERTA, T2R 0A4, OR CALL US AT 269-4733 FOR PICK-UP.

1. Please rate the existing 1st Avenue N.E. business area (between Edmonton Trail and 10th Street N.E.) on each of the following items. Use the rating scale described below:

1 = a very good, positive feature
2 =
3 = OK, basically satisfactory as it is
4 =
5= a very poor/negative feature

_____ overall selection and variety of stores/services in the area
_____ competitive prices relative to other shopping areas
_____ unique specialty shops
_____ service quality and friendliness
_____ convenient parking for customers
_____ accessibility of the business area by car
_____ condition and attractiveness of the street and sidewalks
_____ condition and attractiveness of private buildings
_____ convenient hours of store operation (for customers)
_____ outdoor, open air shopping
_____ promotions, sales and special events
_____ entertainment and recreation opportunities

What improvements or changes would you like to see in the 1st Avenue N.E. business area to better meet the needs of your business?

____

____

____

2. What support services, facilities and local conditions are important for your business, or for your business to be located close to (within a few blocks)? Please rank each of the following, using the priority scale shown below. Feel free to add others that are not included in the list.

1 = extremely important
2 = quite important
3 = somewhat important
4 = not important

_____ adequate staff parking
_____ adequate customer parking
_____ an attractive and interesting urban area/physical environment
_____ direct exposure to high volume of crosstown automobile traffic
_____ direct exposure to high volume of local pedestrian traffic
_____ an excellent local roadway system for customer automobile circulation
_____ excellent connections to major crosstown roadways/freeways
_____ proximity and easy access to public transit system/bus routes
_____ proximity to restaurants
_____ proximity to recreation and entertainment facilities
_____ proximity to business support services (ie, banks, accountants, office supplies, insurance, etc.)
_____ proximity to the Bow Valley Centre hospital or other institutions in the area
_____ proximity to a wide mix and variety of local businesses and services
_____ relatively low-cost business space

The following questions are about your company or business. Your responses will be valuable in helping us to identify current trends, opinions and indicators for businesses on 1st Avenue. Responses are confidential. They will only be used for distribution purposes after being combined for various business types.

3. Name of Business ____

4. Type of Business ____

5. Approximately what proportion of your total business is conducted with customers from each of the following geographic areas?

   - residents of the Bridgeland/Riverside neighbourhood ______%
   - residents of the immediately adjacent neighbourhoods of Renfrew and Crescent Heights ______%
   - other residents from the downtown and inner city neighbourhoods ______%
   - remainder of Calgary ______%
   - outside Calgary ______%
   - hospital employees, visitors and patients ______%
   - employees of businesses and offices located on 1st Ave N.E. ______%
   - downtown office employees ______%
   - staff and clients of other institutions in the area ______%

6. What is the approximate size of the space your business presently occupies? __________ sq. ft.

   How much of this floorspace is used for purposes of serving the public (ie, clients, customers)? __________ sq. ft.

7. Does your firm/company own the space it currently occupies?

   ______ yes

   ______ no

8. How long has your business been in operation at this location?

____

What do you think were the primary reasons for originally deciding to locate your business on 1st Avenue N.E.?

____

____

Do you still feel that this is a good location for your type of business?

_____ yes
_____ no; Why not? ____________________________
____

Do you plan to remain at this location in the forseeable future?

_____ yes
_____ no; How soon would you likely move? ________________
What area would you likely move to? ________________
____

9. What proportion of your total staff/employees travel to work by each of the following means?

by car	_____ %
by bus/transit	_____ %
by foot or bike	_____ %

What proportion of your customers arrive at your business by each of the following means?

by car	_____ %
by bus/transit	_____ %
by foot or bike	_____ %

Is there adequate parking available?

- for employees	_____ yes	_____ no
- for customers	_____ yes	_____ no

For customers who arrive by car where do they usually park?

on-site parking lot ______ %
off-site parking lot ______ %
on-street parking ______ %

10. In what Calgary shopping centres or commercial areas do you feel that your business' strongest competition is located?

11. Do you think that retail trade in the 1st Avenue N.E. business area could be improved? If no, why not? If yes, what are your suggestions for improving business?

12. Have you changed or modified you product line or type of service recently? If so, what changes have been made?

13. What kinds of new goods and/or services do you think are needed on 1st Avenue N.E. in order to serve existing customers/clients better and attract new shoppers/clients to the area?

14. Does your business advertise regularly?

________ no

________ yes; Approximately what proportion of your annual advertising budget is spent on each of the following?

____________ billboards

____________ coupons

____________ flyers, magazines

____________ newspapers

____________ radio

____________ television

____________ T.V. listings

____________ other, please specify: ______________________________

Approximately how may dollars do you allocate annually to advertising?

$____________

15. Please indicate the approximate gross sales for your business during the past 5 years. What has been the growth rate (or % change) for your business during this period?

	Approximate Gross Sales	*Growth Rate*	
1987	__________	__________	%
1988	__________	__________	%
1989	__________	__________	%
1990	__________	__________	%
1991	__________	__________	%

16. During what part of the year do you generate the largest proportion of your sales? (check one)

January - April _____ (____ %)
May - June _____ (____ %)
July - August _____ (____ %)
September - November _____ (____ %)
Pre-Christmas _____ (____ %)

17. Do you think the 1st Avenue Business Association should consider initiatives such as coordinated advertising, coordinated promotional activities, coordinated store hours of operation, or coordinated recruitment of new businesses?

_______ yes
_______ no

If yes, would your business consider contributing financial support to the cost of these coordinated business area improvement initiatives?

_______ yes
_______ no

THANK YOU FOR YOUR PARTICIPATION IN THIS SURVEY. LEAVE THE COMPLETED QUESTIONNAIRE NEAR THE RECEPTION/SALES AREA OF YOUR COMPANY FOR PICK-UP BY A WALKER BROWN URBAN CONSULTANTS LTD. REPRESENTATIVE NEXT WEEK (FRIDAY DECEMBER 13, 1991).

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Table 1
RATINGS OF SELECTED 1st AVENUE N.E. CHARACTERISTICS
(Base = 19 respondents)

FEATURE	VERY POOR 1	2	------------ 3	VERY GOOD 4	5	DON'T KNOW	AVERAGE SCORE
Overall Selection and Variety of Stores	3	6	8	0	1	1	2.32
Competive Prices Relative to Other Shopping Areas	1	2	10	2	0	4	2.26
Unique Specialty Stores	4	2	6	1	5	1	2.89
Service, Quality, Friendliness	0	0	7	4	6	2	3.53
Convenient Customer Parking	8	4	5	0	1	1	1.89
Accessibility of Business Area by Car	0	0	10	5	3	1	3.42
Condition and Attractiveness of Street and Sidewalks	3	8	6	1	0	1	2.16
Condition and Attractiveness of Private Buildings	3	5	8	2	0	1	2.37
Convenient Hours of Operation	1	1	9	3	3	2	3.00
Outdoor, Open Air Shopping	7	1	6	1	2	2	2.16
Promotions, Sales, and Special Events	2	9	4	1	0	3	1.89
Entertainment and Recreation Opportunities	6	6	4	1	0	2	1.79

Table 1b
OTHER IMPROVEMENTS OR CHANGES SUGGESTED

More Variety of Businesses	5	19%
More Retail Space Available at Ground Level	3	12%
More or Better Parking	7	27%
Storefront Improvements	4	15%
Improved Traffic Patterns	3	12%
Shopping Mall	1	4%
Coffee Shop	1	4%
Fast Food Restaurant	1	4%
No Change	1	4%
Total Responses	26	100%

Table 2
IMPORTANCE OF LOCATIONAL FACTORS FOR LOCAL BUSINESSES/SERVICES
(Base = 19 respondents)

	NOT IMPORTANT------VERY IMPORTANT				DONT	AVERAGE
FACTOR:	1	2	3	4	KNOW	SCORE
Adequate Staff Parking	0	0	5	13	1	3.53
Adequate Customer Parking	0	0	1	17	1	3.74
Attractive and Interesting Urban Area/Physical Environment	2	3	9	5	0	2.89
Exposure to High-Volume Cross-Town Auto Traffic	7	1	8	3	0	2.37
Exposure to High-Volume Local Pedestrian Traffic	5	3	6	5	0	2.58
Excellent Local System for Customer Auto Circulation	1	3	6	9	0	3.21
Excellent Connections to Cross-Town Roadways/Freeways	1	4	6	8	0	3.11
Proximity and Access to Public Transit System/Bus Routes	0	2	5	12	0	3.53
Proximity to Restaurants	7	5	2	5	0	2.26
Proximity to Recreation and Entertainment Facilities	9	5	3	2	0	1.89
Proximity to Business Support Services	6	7	2	4	0	2.21
Proximity to Area Institutions	3	1	4	11	0	3.21
Proximity to a Wide Mix of Local Businesses and Services	1	7	4	7	0	2.89
Relatively Low-Cost Business Space	0	2	6	11	0	3.47

Table 3
NUMBER OF RESPONDENTS BY BUSINESS TYPE

Convenience, Grocery, Drug	4	21%
Restaurant, Entertainment	0	0%
Home Furnishings, Hardware	0	0%
Apparel and Accessories	0	0%
Automotive Sales, Service Parts	1	5%
Specialty and Other Retail	2	11%
Personal Services, Incl. Office (Medical)	12	63%
Total Respondents	19	100%

Table 4
ORIGIN OF CUSTOMERS

	Services & Medical Offices	Retail Goods
Residents of Bridgeland/Riverside	19.2%	9.1%
Residents of Renfrew and Crescent Heights (immediately adjacent neighbourhoods)	10.8%	6.4%
Residents of Downtown and Inner City Neighbourhoods	11.3%	7.3%
Remainder of Calgary	29.8%	36.9%
Outside Calgary	6.7%	12.3%
Hospital Employees, Visitors, and Patients	12.8%	7.1%
Employees of Businesses and Offices Located on 1st Street NE	2.1%	4.1%
Employees of Downtown Offices	5.4%	13.7%
Staff and Clients of Other Area Institutions	2.1%	3.0%
	100%	100%
Number of Respondents	12	7

Table 5
SIZE OF BUSINESS FLOORSPACE, BY BUSINESS TYPE

	Less Than 500 sq.ft.	500 to 1000 sq.ft.	1001 to 1500 sq.ft.	1501 to 2000 sq.ft.	Over 2000 sq.ft.
Convenience, Grocery, Drug	0	1	1	1	1
Restaurant, Entertainment	0	0	0	0	0
Home Furnishings, Hardware	0	0	0	0	0
Apparel and Accessories	0	0	0	0	0
Automotive Sales, Service Parts	0	1	0	0	0
Specialty and Other Retail	0	1	1	0	0
Personal Services, Office (Medical)	2	4	4	1	1
Total Respondents = 19	2	7	6	2	2

TENURE OF BUSINESS PREMISES

Own	5	26%
Non-Ownership/Lease	14	74%
No Response	0	0%
Total Respondents	19	100%

Table 6
LENGTH OF OPERATION ON 1st AVENUE

(Base = 19 respondents)

Less than 1 year	1	5%
1 to 2.9 years	1	5%
3 to 4.9 years	2	11%
5 to 9.9 years	7	37%
10 to 14.9 years	5	26%
15 to 19.9 years	2	11%
Over 20 years	1	5%
No Response	0	0%
Total Respondents	19	100%

REASONS FOR LOCATING ON 1st AVENUE NE

(multiple responses permitted)

Close to General Hospital	9	33%
Close to Bow Valley Centre	4	15%
Close to Medical Building	1	4%
Location, Central Location	6	22%
Convenience	1	4%
Close to Home	2	7%
Accessible by Car/Transit	2	7%
Good Cultural Mix	1	4%
Inexpensive Rent	1	4%
Total Responses	27	100%

DO YOU STILL FEEL THIS IS A GOOD LOCATION?

Yes	19	100%
No	0	0%
No Response	0	0%

DO YOU PLAN TO REMAIN AT THIS LOCATION IN THE FUTURE?

Yes	19	100%
No	0	0%
No Response	0	0%

Table 7
HOW EMPLOYEES TRAVEL TO WORK

		Average % of Employees
Car	18	95%
Bus/Transit	0	0%
Walk/Bike	1	5%
Total Respondents	19	100%

HOW CUSTOMERS ARRIVE AT STORES/SERVICES
(multiple responses permitted)

		Average % of Customers
Car	19	78%
Bus/Transit	15	15%
Walk/Bike	12	7%
Total Respondents	19	100%

IS PARKING ADEQUATE?

For Employees	Yes	12	63%
	No	7	37%
For Customers	Yes	6	32%
	No	13	68%

WHERE CUSTOMERS PARK
(multiple responses permitted)

		Average % of Customers
On-Site Lot	14	27%
Off-Site Lot	8	12%
On-Street	17	61%
Total Respondents	19	100%

Table 8
LOCATION OF COMPETITION
(Base = 19 respondents)
(multiple responses permitted)

	Services & Medical Offices		Retail Goods	
In Same Business Area	0	0%	1	14%
17th Avenue SW	0	0%	1	14%
Kensington	1	8%	0	0%
Downtown	1	8%	0	0%
NE Shopping Areas	2	17%	0	0%
Not Applicable/None	6	50%	1	14%
No Response	3	25%	4	57%
Total Responses	12		7	

SUGGESTIONS FOR IMPROVING TRADE
(multiple responses permitted)

	Services & Medical Offices		Retail Goods	
More or Better Parking	1	8%	0	0%
More Variety of Businesses	4	58%	3	38%
More or Better Business Space	1	17%	1	13%
Better Storefront Image	1	17%	1	13%
Encourage People to Stroll/ Increase Foot Traffic	1	25%	2	25%
A Major Grocery Store	1	8%	0	0%
Longer Business Hours	1	17%	1	13%
Fast Food Outlet, Coffee Shop	1	8%	0	0%
Events	1	8%	0	0%
Total Responses	12		8	

Table 9
CHANGES IN PRODUCT LINE OR TYPE OF SERVICE

Yes, Have Made Changes Recently	1	5%
No, Have Not Made Changes Recently	15	79%
No Response	3	16%
Total Respondents	19	100%

Table 10
SUGGESTIONS FOR NEW GOODS/SERVICES/STORES
(multiple responses permitted)

More Different Medical Practitioners	2	9%
More Small Businesses or Specialty Stores	7	30%
Restaurants, Pubs, Coffee Shop	4	17%
Clothing Stores	4	17%
Hardware, Craft Stores	3	13%
Post Office	1	4%
Large Grocery Store	2	9%
Total Responses	23	100%

Table 11
ADVERTISING

	Services & Medical Offices		Retail Goods	
Advertise Regularly	3	8%	4	71%
Do Not Advertise Regularly	9	75%	2	29%
No Response	0	17%	1	0%
Total Respondents	12	100%	7	100%

TYPE OF ADVERTISING
(multiple responses permitted)

	Services & Medical Offices		Retail Goods	
Flyers, Magazines	2	67%	2	50%
Newspapers	1	33%	2	50%
Radio	0	0%	1	25%
T.V. Listings	1	33%	2	50%
Other	1	33%	1	25%
Total Respondents	3		4	

AVERAGE ADVERTISING EXPENDITURE		$2,400
Total Respondents	7	

Table 12

PEAK SALES SEASON		PROPORTION OF TOTAL ANNUAL SALES PER SALES SEASON	
		Respondents	Average %
January to April	3	2	38%
May and June	0	0	0%
July and August	0	0	0%
September to November	4	2	33%
Pre-Christmas	3	1	25%
Total Respondents	10	5	

Table 13
SHOULD 1st AVENUE BUSINESSES CONSIDER COORDINATED IMPROVEMENT INITIATIVES?

Yes	9	47%
No	6	32%
No Response	4	21%
Total Respondents	19	100%

WOULD YOU CONSIDER CONTRIBUTING FINANCIAL SUPPORT TOWARD COORDINATED INITIATIVES?

Yes	7	37%
No	6	32%
No Response	6	32%
Total Respondents	19	100%

APPENDIX B:
ON-STREET SHOPPER INTERCEPT INTERVIEWS

1ST AVENUE N.E. SHOPPER INTERCEPT SURVEY
MARCH 1992

(RECORD NO. ______)

---

1. What major shopping areas or shopping centres do you shop at regularly for non-grocery items? (indicate names of first, second, and third most frequently visited shopping areas or shopping centres)

    1. ______________________________

    2. ______________________________

    3. ______________________________

2. What are the major reasons you have for shopping at these preferred centres?

(1)	(2)	(3)
______________	______________	______________
______________	______________	______________
______________	______________	______________

3. How often do you shop at or visit businesses located on 1st Avenue NE (between Edmonton Trail and 10th Street NE)?

once per week or more	_____
2-3 times per month	_____
once each month or two	_____
3-4 times per year	_____
rarely or never	_____

[If rarely or never], What are your primary reasons for not shopping on 1st Avenue NE more often? **(Go to question # 6)**

____

____

4. What types of stores and services do you usually shop at or visit on a typical trip to 1st Avenue NE. What are your major reasons for shopping at, or patronizing these stores/services?

Types of Store	Reasons
__________	__________
__________	__________
__________	__________

5. How do you usually arrive at 1st Avenue NE?

walk/bike _____
bus _____
car _____

[If by car], Where do you usually park? ____________________
(on 1st Ave, on side street, store lot, hospital lot, other?)

Is parking ever a problem?

no _____
yes _____

[If yes], Please explain the nature of the problem:

____

____

6. Where do you shop regularily for food and grocery items? What are your major reasons for shopping at these food/grocery outlets?

Store	Location	Reasons
__________	__________	__________
__________	__________	__________
__________	__________	__________

7. Do you ever come to 1st Avenue NE for purposes other than shopping or business?

No _______
Yes _______ Please specify: ____________________

8. Will you be visiting the hospital or any other institution that is within walking distance of 1st Avenue NE? *(eg, Carewest, George Boyack Nursing Home, Christine Meikle School, Columbus Manor, CNIB, Bow Valley Lodges, Rehabilitation Society, other)*

_____ Yes _____ No

[If yes], Which local institution and what is your reason for visiting this institution?

Name of Institution: ______________________________

____________ employee
____________ patient
____________ resident
____________ visitor
____________ professionl practice
____________ other, please specify ____________________

9. Are there particular types of stores, services or activities that you would like to see more of on 1st Avenue NE? If so, please specify for each of the following.

Retail Stores: ____________________
____
____

Restaurants/ Entertainment: ____________________
____
____

Recreation: ____________________
____
____
____

Personal Services: ____________________
____
____

If these stores, services or activities were to be found on 1st Avenue NE in the future, do you think you would likely shop at 1st Avenue NE stores:

i) _______ about the same amount as before
ii) _______ somewhat more often than before, or
iii) _______ much more often than before?

10. Please indicate for each of the following, whether you think they are negative, neutral or positive aspects of shopping on 1st Avenue NE. (Use the rating scale described below).

1 = a very poor, negative feature
2 =
3 = OK, basically satisfactory as it is
4 =
5 = a very good, positive feature
DK = don't know

___ overall selection and variety of stores/services in the area
___ competitive prices relative to other shopping areas
___ unique specialty stores
___ service quality and friendliness
___ convenient parking for customers
___ accessibility of the business area by car
___ condition and attractiveness of the street and sidewalks
___ condition and attractiveness of private buildings
___ convenient hours of store operation (for customers)
___ outdoor, open air shopping
___ promotions, sales and special events
___ entertainment and recreation opportunities.

Are there any other things about shopping on 1st Avenue NE that you like or dislike?

____

____

11. The following are some possible changes to the 1st Avenue NE business area. Please indicate using a scale of 1 to 5, how likely it is that you would visit 1st Avenue NE more often if these changes were made. "1" means very unlikely to visit more often, and "5" means very likely to visit more often.

Improvements to the sidewalks, new street lights, and benches.	1 2 3 4 5
Adding additional stores and services to the area	1 2 3 4 5
Replacing part of the hospital parking lot with new stores on the south side of 1st Avenue.	1 2 3 4 5
Improving the supply of customer parking in the area.	1 2 3 4 5
A "European Village" theme which would coordinate improvements to buildings throughout the area including colours, signage, and building facades	1 2 3 4 5
More advertising of the goods and services that are available on 1st Avenue	1 2 3 4 5
Slower traffic and safer pedestrian crossings on 1st Avenue	1 2 3 4 5
More sales and promotional events	1 2 3 4 5

12. Which of the following types of promotions and activities would be of most interest to you? (Select 3 and rank them in order of interest as 1, 2, 3)

______ street fair or bazaar
______ sidewalk sales
______ outdoor entertainment
______ coupon books, contests and prizedraws
______ talent contents or other community-oriented activities
______ none of the above
______ other, please specify ______________________________

13. Where do you live?

______ In Calgary, specify neighbourhood ______________________
______ Outside Calgary, specify closest town ______________________
______ Outside Alberta

14. How many adults are there in your household in each of the following age groups?

18 - 34 ____ 35 - 49 _____ 50 and over ____

15. How many children?
less than 6 years _____ 6 - 11 years _____ 12 - 17 years _____

16. How many full-time income earners? _____
How many part-time income earners? _____

17. What range would best describe your annual household income?

less than $20,000 _____
$20,000 - $30,000 _____
$30,000 - $40,000 _____
$40,000 - $50,000 _____
$50,000 - $60,000 _____
more than $60,000 _____

18. Do you work within walking distance of 1st Avenue NE? yes ___
no ___

19. Do you live within walking distance of 1st Avenue NE? yes ___
no ___

TO BE COMPLETED BY INTERVIEWER

20. Gender of respondent male _____
female _____

21. Approximate age of respondent

under 25 _____
25 - 50 _____
over 50 _____

22. Location of interview:
Nearest store, or name of block face where interview occured

____

23. Time of interview: _______________________

24. Interviewer: _______________________

Table 1:
SHOPPING AREAS VISITED MOST OFTEN FOR NON-GROCERY ITEMS
(Base = 106 shoppers interviewed)

	VISITED MOST OFTEN		OTHER CENTRES VISITED	
Downtown	31	33%	16	21%
Marlborough Mall	10	11%	10	13%
Sunridge Mall	13	14%	11	14%
Chinook Centre	6	6%	4	5%
Franklin Mall & other NE	4	4%	3	4%
Market Mall	5	5%	6	8%
Northland Village	2	2%	1	1%
North Hill Mall	5	5%	9	12%
Mount Royal Village, 17 Ave., or Brittania	4	4%	1	1%
Brentwood Mall	1	1%	5	7%
Deerfoot Mall	3	3%	1	1%
Kensington	1	1%	2	3%
Southcentre	5	5%	1	1%
Other NW	3	3%	2	3%
Other SW	2	2%	4	5%
Total Responses	95	100%	76	100%
No Regular Centre	11			
TOTAL RESPONDENTS	106			

Table 2:
REASONS FOR SHOPPING AT CENTRES VISITED "MOST OFTEN"

	THOSE WHO SHOP DOWNTOWN		THOSE WHO SHOP MARLBOROUGH		THOSE WHO SHOP SUNRIDGE		THOSE WHO SHOP OTHER CENTRES		TOTAL FOR ALL RESPONDENTS	
	#	%	#	%	#	%	#	%	#	%
Close By, Convenient	15	48%	8	80%	11	85%	22	46%	56	53%
Good Variety & Selection	6	19%	3	30%	1	8%	11	23%	21	20%
Department Store	2	6%	1	10%	0	0%	1	2%	4	4%
Other Specific Store	3	10%	0	0%	1	8%	4	8%	8	8%
Employed Nearby	5	16%	1	10%	0	0%	1	2%	7	7%
Access by Bus	6	19%	0	0%	0	0%	1	2%	7	7%
Sales, Low Prices	0	0%	0	0%	1	8%	7	15%	8	8%
Atmosphere, Browsing	3	10%	1	10%	0	0%	8	17%	12	11%
Other Reasons	6	19%	3	30%	2	15%	16	33%	27	25%
No. of Respondents	31	100%	10	100%	13	100%	48	100%	106	100%

Table 3
FREQUENCY OF SHOPPING ON 1st AVENUE N.E.

Once per week or more	47	44%
2 to 3 times per month	14	13%
Once each month or two	16	15%
3 to 4 times per year	10	9%
Rarely or never	13	12%
First Time	6	6%
Total Respondents	106	100%

REASONS FOR NOT SHOPPING ON 1st AVENUE N.E.
(Base = 13 respondents
who shop on 1st Avenue "rarely or never")

Only Here to Visit Hospital	1	9%
Only Here to Work	2	18%
Nothing Here of Interest	3	27%
Support Own Community	1	9%
Get What They Want Elsewhere	2	18%
Better Prices Elsewhere	1	9%
Inconvenient, Too Far	1	9%
Total Responses	11	100%
No Response	2	
TOTAL RESPONDENTS	13	

Table 4
TYPES OF STORES and/or SERVICES VISITED ON TRIPS TO 1st AVE. N.E.

(Base = 93 regular or first time 1st Ave. shoppers; multiple responses permitted)

Italian Centre	42	24%
Gourmet Food	4	2%
Bakery	40	23%
NE Grocery/Deli	21	12%
La Brezza, Other Restaurants	9	5%
Ice Cream Shop	4	2%
Drugstore	17	10%
Flower Shop	2	1%
Convenience Stores	16	9%
Personal Service (ie, bank, Dr., Hair, etc.)	20	11%
Total Responses	175	100%

REASONS FOR VISITING 1st AVENUE STORES/SERVICES

(Base as above)

Convenience, Access, Close By	43	27%
Particular Item	58	37%
Quality, "Best in Town"	32	20%
Friendliness, Atmosphere	16	10%
Selection, Have What I Want	8	5%
Total Responses	157	100%

Table 5

USUAL METHOD OF TRAVEL TO 1st AVENUE N.E.

(Base = 93 regular or first-time shoppers)

Walk, Bike	36	39%
Bus	7	8%
Car	49	53%
Total Responses	92	100%
No Response	1	
TOTAL RESPONDENTS	93	

PARKING CONCERNS

(Base = 49 respondents who arrived by car)

Parking Not a Problem	38	78%
Have Parking Problem	11	22%
No Response	0	0%
Total Respondents	49	100%

SUMMARY OF PARKING PROBLEMS

(Base = 11 respondents who had parking problems)

Parking is Difficult to Find	6	55%
Area is a Little Congested at Some Times of Day	5	45%
Total Respondents	11	100%

OF THOSE ARRIVING BY CAR, WHERE DO THEY PARK?

(Base = 49 respondents who arrived by car)

On 1st Avenue or Side-Street	29	76%
Store Lot	4	11%
Hospital Lot	1	3%
Other	4	11%
Total Responses	38	100%
No Response	11	
TOTAL RESPONDENTS	49	

Table 6
FOOD STORES VISITED REGULARLY

(Base = 106 shoppers interviewed;
multiple responses permitted)

Co-op	61	39%
Safeway	55	35%
Superstore	13	8%
Food-For-Less	13	8%
1st Avenue NE Stores	3	2%
Other Stores	12	8%
Total Responses	157	100%

LOCATION OF FOOD STORES VISITED REGULARLY

Centre St./16 Ave. N. Area	46	31%
Marlborough & Other NE	40	27%
Kensington	3	2%
Downtown	6	4%
1st Avenue NE Area	4	3%
Other NW	27	18%
Other SW	17	11%
Other SE	5	3%
Total Responses	148	100%

REASONS FOR VISITING PREFERRED FOOD STORES

Close, Handy	72	62%
Prices, Selection	21	18%
Atmosphere	7	6%
Co-op Member	11	9%
Accessible by Bus	4	3%
No Stores on 1st Ave NE	2	2%
Total Responses	117	100%

Table 7
VISITS TO 1st AVENUE AREA
(Base = 106 shoppers interviewed)

Come For Shopping or Business Only	29	27%
Come for Other Reasons	71	67%
No Response	6	6%
Total Respondents	106	100%

OTHER REASONS FOR VISITING 1st AVENUE NE
(Base = 71 respondents who visit 1st Ave. for reasons other than shopping or business)

Live Nearby	3	4%
Work There	8	11%
Visiting Hospital	9	13%
Visiting Family or Friends	6	8%
Walking	10	14%
Catching the Bus	5	7%
Restaurants	14	20%
Community Function/Church	4	6%
Doctor Appointment	8	11%
Haircut	1	1%
Banking	1	1%
Other	2	3%
Total Respondents	71	100%

Table 8
VISITS TO AREA INSTITUTIONS

(Base = 106 shoppers interviewed)

Will Not be Visiting an Area Institution	80	75%
Will Visit an Institution	25	24%
No Response	1	1%
Total Responses	106	100%

INSTITUTION TO BE VISITED

(Base = 25 respondents)

Hospital	17	68%
George Boyack Nursing Home	2	8%
Professional Medical Bldg.	3	12%
Institution Not Specified	3	12%
Total Responses	25	100%

REASON FOR VISITING ABOVE INSTITUTION

(Base = 25 respondents)

Employee	7	28%
Patient	8	32%
Visitor	6	24%
Professional Practice	1	4%
Other	3	12%
Total Responses	25	100%

Table 9
FACILITIES THAT RESPONDENTS WOULD LIKE TO SEE ON 1st AVENUE

(Base = 106 shoppers interviewed; multiple responses or no response permitted)

		NO. OF RESPONSES	PERCENT OF TOTAL
RETAIL STORES			
Major Grocery Store		24	35%
Hardware, Household Goods		10	14%
Specialty Shops (crafts, butcher, greengrocer, etc.)		18	26%
Clothing/Shoes		7	10%
Sporting Goods		1	1%
Department Store		2	2%
Bigger Shopping Centre		2	2%
More Italian Goods		1	1%
Other Ethnic Stores		3	2%
Deli		1	1%
	Subtotal	69	53%
RESTAURANTS			
More Restaurants		5	4%
Canadian or American Restaurant		4	3%
Fast Food Restaurant		2	2%
A Restaurant Open at Noon		1	1%
Cafe, Bistro, Coffee Shop		5	4%
Other		5	4%
	Subtotal	22	17%
RECREATION/ENTERTAINMENT			
Neighbourhood Pub		3	2%
Theatre		4	3%
Playground, Park, Bike/Walking Paths, Benches		5	4%
Fitness Centre		4	3%
Seniors' Recreation Centre		3	2%
Indoor Pool		1	1%
Bowling Alley		1	1%
Other		2	2%
	Subtotal	23	18%
PERSONAL SERVICES			
Post Office		8	6%
Dentists		2	2%
Beauty Salon		1	1%
Other Professional People		1	1%
Other		3	2%
	Subtotal	15	12%
TOTAL RESPONSES		129	100%

Table 10
EFFECT OF ADDING NEW STORES/FACILITIES/SERVICES ON SHOPPING FREQUENCY

	ADDITION OF MORE							
	RETAIL STORES		RESTAUR-ANTS		RECREATION/ ENTERTAINMENT		PERSONAL SERVICES	
Would Shop Same as Before	4	8%	4	18%	1	6%	0	0%
Would Shop Somewhat More Frequently	17	34%	11	50%	3	18%	2	14%
Would Shop Much More Frequently	28	56%	7	32%	12	71%	12	86%
No Response	1	2%	0	0%	1	6%	0	0%
Total Responses	50	100%	22	100%	17	100%	14	100%

Table 11

SHOPPER RATING OF SELECTED 1st AVENUE N.E. CHARACTERISTICS

(Base = 106 respondents)

	VERY POOR	------------		VERY GOOD		DON'T	AVERAGE
CHARACTERISTIC	1	2	3	4	5	KNOW	SCORE
Selection/Variety of Stores & Services	11	11	33	14	19	18	3.22
Competitive Prices	8	5	32	20	13	28	3.32
Unique Specialty Stores	18	4	19	17	25	23	3.33
Service, Quality, Friendliness	31	2	11	18	33	21	3.59
Convenient Customer Parking	18	11	21	14	19	23	3.06
Accessibility by Car	19	14	15	12	26	20	3.14
Condition and Attractiveness of Street & Sidewalks	10	11	38	22	14	11	3.20
Condition and Attractiveness of Private Buildings	2	12	48	22	9	13	3.26
Convenient Hours of Operation	8	9	29	14	18	28	3.32
Outdoor, Open-Air Shopping	18	12	23	7	13	33	2.79
Promotions, Sales, and Special Events	13	9	24	9	4	47	2.69
Entertainment & Recreation	17	8	25	9	9	38	2.78

Note that Average Score excludes those who responded "don't know"

Table 12
OTHER COMMENTS: LIKES AND DISLIKES ABOUT 1st AVENUE

LIKES		
Italian Stores, Italian Things	5	13%
Friendliness, Service, Area, Atmosphere	10	26%
The Ethnic Aspect	7	18%
Specific Store/Item	3	8%
Selection/Variety	2	5%
Quality	2	5%
Restaurants	1	3%
Uniqueness of Shops	2	5%
Size of Shops	1	3%
Close, Able to Walk Here	4	11%
Availability of Fresh Fruit in Season	1	3%
Bakery-Type Painting Enhances District	1	3%
Total Responses	38	100%

DISLIKES		
"Nothing Here"	4	13%
Stores are Limited/Need More Variety	6	19%
Hours of Operation	5	16%
Storefronts/Sidewalks	5	16%
Overall Appearance Needs to be Improved	1	3%
Traffic	3	10%
Hospital Parking Lot Detracts	2	6%
Needs a Park	1	3%
No Parking in Front of Professional Bldgs	1	3%
Little Stores are too Expensive	1	3%
More Streetlights	1	3%
Other	1	3%
Total Responses	31	100%

Table 13
EFFECT OF SELECTED IMPROVEMENTS ON SHOPPING FREQUENCY

	LIKELIHOOD OF VISITING MORE OFTEN						
	UNLIKELY	-----------		VERY LIKELY		DON'T	AVERAGE
POSSIBLE CHANGE	1	2	3	4	5	KNOW	SCORE
Improvements to Sidewalk, New Streetlights, Benches	50	5	23	13	11	4	2.31
Additional Stores & Services	20	7	17	25	34	3	3.45
Replace Part of Hospital Parking Lot With New Stores	42	8	16	12	24	4	2.69
Improving Supply of Customer Parking in Area	53	3	15	13	15	7	2.33
"European Village" Theme	26	8	12	27	30	3	3.26
More Advertising	40	8	25	16	14	3	2.57
Slower Traffic & Safer Pedestrian Crossings	43	9	17	6	29	2	2.70
More Sales and Promotional Events	40	10	21	16	15	4	2.57

Note that Average Score excludes those who responded "don't know"

Table 14
PROMOTIONS AND ACTIVITIES OF INTEREST TO SHOPPERS
(Base = 106 respondents; second and third choices optional)

	FIRST CHOICE		SECOND CHOICE		THIRD CHOICE	
Street Fair or Bazaar	38	38%	19	28%	3	6%
Sales, Sidewalk Sales	14	14%	18	27%	12	24%
Outdoor Entertainment	10	10%	17	25%	16	31%
Coupon Books, Contests, Prize Draws	4	4%	5	7%	12	24%
Talent Contests or Other Community-Oriented Activities	4	4%	4	6%	3	6%
Children's Shows	0	0%	1	1%	0	0%
Other	2	2%	1	1%	3	6%
None of The Above	28	28%	2	3%	2	4%
Total Responses	100	100%	67	100%	51	100%
No Response	6					
TOTAL RESPONDENTS	106					

Table 15

DISTRIBUTION OF RESPONDENTS BY COMMUNITY

Bridgeland	49	46%	(1 Hosp.no category; 2 Hosp.patient; 1 Hosp. employee; 2 Hosp.'other'; 1 Med.Bldg.patient; 1 Hosp.visitor)
Crescent Heights	3	3%	
Renfrew	2	2%	
Queens Park Village	1	1%	
Mount Pleasant	1	1%	(Hospital visitor)
Capitol Hill	1	1%	
Hillhurst/W.Hillhurst	2	2%	(1 Hospital visitor)
Scarboro	1	1%	
Richmond	1	1%	
Killarney/Glengarry	1	1%	
Mount Royal	2	2%	(1 George Boyak employee)
Downtown Centre	1	1%	(Unspecified, professional practice)
Ramsey	1	1%	(Hospital patient)
Elbow Park	1	1%	
Mayland Heights	1	1%	
Albert Park/Radisson	1	1%	(Hospital patient)
Marlborough	1	1%	
Forest Heights	1	1%	(Medical Bldg. patient)
Saddle Ridge	1	1%	
Whitehorn	2	2%	(1 Unspecified visitor)
Temple	2	2%	(Hospital employee)
Rundle	1	1%	(Hospital employee)
Pineridge	1	1%	
Hawkwood	1	1%	(Hospital patient)
Edgemont	2	2%	
Brentwood	1	1%	(Medical Bldg. patient)
Other Northwest	1	1%	(Unspecified visitor)
Varsity	3	3%	
University Heights	1	1%	(Hospital employee)
Huntington Hills	1	1%	
Beddington	1	1%	
North Haven	1	1%	
Highwood	1	1%	(Hospital employee)
Patterson	1	1%	
Point McKay	1	1%	
Strathcona Park	1	1%	
Westgate	1	1%	
Glamorgan	1	1%	
Lakeview	1	1%	
Braeside	1	1%	
Acadia	1	1%	(George Boyak visitor)
Willow Park	1	1%	
Maple Ridge	2	2%	
Out of Town	4	4%	(1 Hospital employee)
TOTAL RESPONDENTS	106	100%	

Table 16
DEMOGRAPHIC PROFILE OF SURVEY RESPONDENTS

(Base = 106 shoppers interviewed)

GENDER

Male	45	42%
Female	55	52%
"Couple"	5	5%
Don't Know	1	1%
Total Respondents	106	100%

AGE

Under 25	13	12%
25 to 50	62	58%
Over 50	29	27%
No Response	2	2%
Total Respondents	106	100%

LIVE WITHIN WALKING DISTANCE

Yes	52	49%
No	54	51%
No Response	0	0%
Total Respondents	106	100%

WORK WITHIN WALKING DISTANCE

Yes	26	25%
No	79	75%
No Response	1	1%
Total Respondents	106	100%

INCOME EARNERS PER HOUSEHOLD:
(Base = 106 respondents)

FULL TIME		
0 Full-Time Earners	25	24%
1 Full-Time Earner	38	36%
2 Full-Time Earners	35	33%
3 Full-Time Earners	7	7%
4 Full-Time Earners	1	1%
Average =	1.25	

PART TIME		
0 Part-Time Earners	87	82%
1 Part-Time Earner	18	17%
2 Part-Time Earners	1	1%
3 Part-Time Earners	0	0%
4 Part-Time Earners	0	0%
Average =	0.19	

HOUSEHOLD INCOME:

Less than $20,000	10	14%
$20,000 - $30,000	9	13%
$30,000 - $40,000	14	20%
$40,000 - $50,000	10	14%
$50,000 - $60,000	11	16%
Retired	12	17%
Student	3	4%
Total Responses	69	100%
No Response	13	
TOTAL RESPONDENTS	106	

Table 17
HOUSEHOLD COMPOSITION
(Base = 106 shoppers interviewed)

HOUSEHOLDS WITH ADULTS:
(Total = 106)

Average No. of Adults per Household
2.18

AGES 18 to 34

Households with 0	47
Households with 1	24
Households with 2	29
Households with 3	2
Households with 4	4
Average =	**0.98**

AGES 35 to 49

Households with 0	61
Households with 1	20
Households with 2	25
Households with 3	0
Households with 4	0
Average =	**0.66**

AGES 50 and OVER

Households with 0	71
Households with 1	15
Households with 2	18
Households with 3	2
Households with 4	0
Average =	**0.54**

HOUSEHOLDS WITH CHILDREN:
(Total = 28)

Average No. of Children per Household
1.75

AGED LESS THAN 6

Households with 0	89
Households with 1	11
Households with 2	6
Households with 3	0
Households with 4	0
Average =	**0.82**

AGES 6 to 11

Households with 0	100
Households with 1	5
Households with 2	0
Households with 3	1
Households with 4	0
Average =	**0.29**

AGES 12 to 17

Households with 0	94
Households with 1	5
Households with 2	5
Households with 3	2
Households with 4	0
Average =	**0.75**

APPENDIX C: SPECIALTY FOOD STORE EXIT SURVEYS

1ST AVENUE NE SPECIALTY STORE "EXIT SURVEY"/ FEB. 29, 1992

> Hello. My name is ______. I'm doing a survey of customers on behalf of the 1st Avenue Business Association. Could I ask you a few very brief questions about why you shop here? The survey would take about 2 minutes of your time.

1. How much did you spend at this store today? $______________

2. During an average month, how many times do you visit this store?

   First visit to this store: (check space) ____________ [OR]
   Average number of visits per month: ____________

   [IF RESPONDENT VISITS LESS THAN ONCE PER MONTH]
   During an average year how many times do you visit this store?

   Average number of visits per year: ____________

3. Do you generally visit other stores in the area when you come to 1st Ave?

   ☐ Yes ☐ No

   [IF YES], What stores do you often visit when you shop on 1st Ave?

   ____

   ____

4. What is the most important reason you usually come to 1st Ave. NE to shop?

   ____

   Are there any other reasons?

   ____

5. When you shop on 1st Avenue, how often is your shopping trip combined with a visit to the hospital? [READ RESPONSES]

   ☐ Very Often ☐ Not Very Often
   ☐ Somewhat Often ☐ Not At All [GO TO Q.#6]

   [IF RESPONDENT EVER COMBINES HOSPITAL & SHOPPING]
   When you visit the hospital is it normally as..

   ☐ a staff member, ☐ a patient, or ☐ a visitor

   [IF NONE OF THE ABOVE] please specify reason for hospital visits

   ____

6. Where do you live? We would like to know the name of the Calgary community you live in (or closest major intersection). If you live outside of Calgary we would like to know the name of the municipality you live in.

   ____

7. In case my supervisor would like to verify this survey, could I please have your first name or initials and your phone number?

   Name/Initials: __________ Phone:______________

TO BE COMPLETED BY INTERVIEWER

Store Location:	☐ DELI	☐ BAKERY	☐ GROCERY
Approx. age of respondent:	☐ 18-34	☐ 35-49	☐ Over 50
Sex of Respondent:	☐Male	☐Female	
Interviewer's Name:	____________		
Time of Interview:	____________		

Table 1:
HOW MUCH DID YOU SPEND AT THIS STORE TODAY?

	DELI		GROCERY		BAKERY		TOTAL	
	#	%	#	%	#	%	#	%

CONFIDENTIAL

Table 2:
HOW MANY TIMES DO YOU VISIT THIS STORE DURING AN AVERAGE MONTH/YEAR?

	DELI		GROCERY		BAKERY		TOTAL	
	#	%	#	%	#	%	#	%
First Visit	11	22%	6	9%	5	6%	22	11%
1 or 2 times per year	2	4%	5	7%	3	4%	10	5%
3 or 4 times per year	1	2%	6	9%	3	4%	10	5%
5 to 10 times per year	4	8%	2	3%	1	1%	7	3%
1 or 2 times per month	13	26%	24	34%	22	27%	59	29%
3 or 4 times per month	13	26%	18	26%	35	43%	66	33%
5 or more times per month	6	12%	9	13%	12	15%	27	13%
Total Respondents	50	100%	70	100%	81	100%	201	100%
Average Visits Per Year:	33.7		33		40.1			
Average Visits Per Month: (excludes first visits)	2.8		2.8		3.3			

Note: Grocery & Bakery frequencies shown do not fully account for 3 respondents who shop on a daily basis.

Table 3:
DO YOU GENERALLY VISIT OTHER STORES WHEN YOU COME TO 1ST AVENUE?

	DELI		GROCERY		BAKERY		TOTAL	
	#	%	#	%	#	%	#	%
Yes	37	74%	41	59%	44	54%	122	63%
No	12	24%	29	41%	30	37%	71	37%
Don't Know first time in the area	1	2%	0	0%	7	9%	8	4%
Total Respondents	50	100%	70	100%	81	100%	193	100%
Average Spending:	$12.12		$24.36		$8.78			
SPECIFIC STORES VISITED								
Italian Grocery	33	66%	n/a	n/a	28	35%		
Bakery	16	32%	24	34%	n/a	n/a		
Italian Deli/Pasta	n/a	n/a	17	24%	8	10%		
Drugstore	2	4%	6	9%	9	11%		
Rupp's Meats(Edm. Trail)	2	4%	4	6%	7	9%		
Flowers	4	8%	1	1%	1	1%		
7-11/Mac's Convenience	2	4%	4	6%	6	7%		
Northeast Grocery	0	0%	2	3%	4	5%		
Restaurant	3	6%	3	4%	1	1%		
First City Financial	1	2%	0	0%	3	4%		
Milky Way Ice Cream	1	2%	1	1%	1	1%		
Other	0	0%	4	6%	1	1%		
Total Responses	64		66		69			
Total Respondents	50	100%	70	100%	81	100%		

Table 4a:
MOST IMPORTANT REASON FOR SHOPPING ON 1ST AVENUE?

	DELI		GROCERY		BAKERY		TOTAL	
	#	%	#	%	#	%	#	%
Visit the bakery	0	0%	1	1%	49	60%	50	25%
Italian food, unique good quality food	38	76%	27	39%	2	2%	67	33%
Visit the grocery store	1	2%	19	27%	3	4%	23	11%
Close to home	1	2%	4	6%	14	17%	19	9%
Close to work	0	0%	0	0%	3	4%	3	1%
Purchase pasta	2	4%	6	9%	0	0%	8	4%
Unique ethnic specialties	4	8%	6	9%	1	1%	11	5%
Close to work	0	0%	0	0%	3	4%	3	1%
Fun, interesting atmosphere	2	4%	4	6%	1	1%	7	3%
Visiting hospital	0	0%	0	0%	1	1%	1	0%
Other (single) responses	1	2%	3	4%	4	5%	8	4%
Don't know/no response	1	2%	0	0%	0	0%	1	0%
Total Respondents	50	100%	70	100%	81	100%	201	100%

Table 4b:
OTHER REASONS FOR SHOPPING ON 1ST AVENUE

Friendly service, merchants	6	12%	1	1%	0	0%	7	3%
Close to home/convenient	3	6%	5	7%	0	0%	8	4%
Good food	0	0%	4	6%	0	0%	4	2%
Italian food	1	2%	2	3%	0	0%	3	1%
Like the European feel	0	0%	2	3%	2	2%	4	2%
Quality goods	0	0%	2	3%	1	1%	3	1%
Other (single) responses	3	6%	5	7%	1	1%	9	4%
No other reason	37	74%	49	70%	77	95%	163	81%
Total Respondents	50	100%	70	100%	81	100%	201	100%

Table 5a:
HOW OFTEN IS YOUR SHOPPING TRIP COMBINED WITH A VISIT TO THE HOSPITAL?

	DELI		GROCERY		BAKERY		TOTAL	
	#	%	#	%	#	%	#	%
Very Often	2	4%	0	0%	1	1%	3	1%
Somewhat Often	1	2%	2	3%	3	4%	6	3%
Not Very Often	0	0%	2	3%	9	11%	11	5%
Not At All	47	94%	66	94%	68	84%	181	90%
Total Respondents	50	100%	70	100%	81	100%	201	100%

Table 5b:
THOSE WHO COMBINE SHOPPING WITH HOSPITAL VISIT

Hospital staff	2	67%	0	0%	1	8%	3	15%
Hospital visitor	1	33%	4	100%	12	92%	17	85%
Hospital patient	0	0%	0	0%	0	0%	0	0%
Total respondents:	3	100%	4	100%	13	100%	20	100%

Table 6:
WHERE DO YOU LIVE

	DELI		GROCERY		BAKERY		TOTAL	
	#	%	#	%	#	%	#	%
Residents of Bridgeland	3	6%	12	17%	25	31%	40	20%
Renfrew/Crescent Heights (adjacent neighbourhoods)	5	10%	2	3%	6	7%	13	6%
Remainder of Downtown & Inner City								
Downtown	3		2		3		8	
Connought	1		3		2		6	
Elbow Park	1		0		1		2	
Briar Hill	1		1		0		2	
Cliff Bungalow	1		0		0		1	
Richmond Park	1		3		0		4	
Hillhurst	1		4		0		5	
Sunnyside	1		2		0		3	150%
Mount Royal	1		3		2		6	
Inglewood	1		0		2		3	
Tuxedo	1		2		0		3	
Rosedale	1		1		0		2	
Mount Pleasant	0		1		1		2	100%
Rideau Park	0		1		0		1	
Sunalta	0		1		1		2	
Ramsey	0		0		1		1	
South Calgary	0		0		1		1	
Mission	0		0		1		1	
Sub-Total	14	28%	24	34%	15	19%	53	26%
Sub-Total Dwn/Inner City	22	44%	38	54%	46	57%	106	53%
Calgary Suburbs								
Marlborough	1		0		0		1	
Pineridge	1		0		2		3	
Castle Ridge	0		0		2		2	
Temple	1		1		0		2	
Falconridge	0		0		1		1	
Rundle	0		0		1		1	
Huntington	0		0		1		1	
Subtotal Northeast	3	6%	1	1%	7	9%	11	5%
Parkdale	1		0		0		1	
University Heights	1		1		0		2	
Hawkwood/Edgemont	3		2		0		5	
Charleswood	2		2		1		5	
Dalhousie	1		1		0		2	
Varsity	1		2		2		5	
MacEwan/Sandstone	1		0		1		2	

1st Avenue NE Specialty Store Exit Survey, Feb. 29/92

Bowness	1		0		0		1	
Scenic Acres	0		2		1		3	
Beddington	0		1		2		3	
Silver Springs	0		0		1		1	
Point McKay	0		2		1		3	
Brentwood	0		0		1		1	
Patterson/Coach Hill	0		0		2		2	
Subtotal Northwest	11	22%	13	19%	12	15%	36	18%
Pumphill	2		0		0		2	
Christie/Signal Hill	3		0		1		4	
Chinook Pk/Kelvin Grove	1		1		0		2	
Woodbine/Canyon Mead.	2		2		2		6	
Glamorgan	0		1		0		1	
Bel-Aire	0		1		0		1	
Killarney	0		1		1		2	
Shawnessy	0		2		0		2	
Haysboro	0		0		1		1	
Lakeview	0		0		1		1	
Westgate	0		0		1		1	
Sub-Total Southwest	8	16%	8	11%	7	9%	23	11%
Midnapore/Sundance	1		2		0		3	
Lake Bonavista	2		0		0		2	
Parkland	1		1		0		2	
Penbrook	0		1		0		1	
Acadia	0		0		3		3	
Radisson Heights	0		0		1		1	
Maple Ridge	0		0		1		1	
Sub-Total Southeast	4	8%	4	6%	5	6%	13	6%
Sub-Total All Suburbs	26	52%	26	37%	31	38%	83	41%
Outside Calgary								
Carstairs	1		0		0		1	
Springbank	0		1		0		1	
Canmore	1		1		0		2	
Invermere, BC	0		1		0		1	
DeWinton	0		1		0		1	
Revelstoke, BC	0		1		0		1	
Priddis	0		1		0		1	
High River	0		0		1		1	
Bragg Creek	0		0		1		1	
Sub-Total Out of Town	2	4%	6	9%	2	2%	10	5%
No response/decline	0	0%	0	0%	2	2%	2	1%
Total Respondents:	50	100%	70	100%	81	100%	201	100%

Table 7:
AGE/SEX PROFILE OF EXIT SURVEY RESPONDENTS

	DELI		GROCERY		BAKERY		TOTAL	
	#	%	#	%	#	%	#	%
18 to 34 years								
male	10		8		14		32	
female	8		13		15		36	
total	18	36%	21	30%	29	36%	68	34%
35 to 49 years								
male	8		16		14		38	
female	16		20		21		57	
total	24	48%	36	51%	35	43%	95	47%
50 years and over								
male	3		9		10		22	
female	5		4		7		16	
total	8	16%	13	19%	17	21%	38	19%
Total								
male	21		33		38		92	
female	29		37		43		109	
total	50	100%	70	100%	81	100%	201	100%

APPENDIX D:
HOSPITAL USER INTERVIEWS

SURVEY OF BRIDGELAND INSTITUTIONS

1st AVENUE NE MARKET STUDY /JANUARY 1992

1. Are you aware that there are a number of retail stores, restaurants and services located on 1st Avenue immediately north of the hospital ?
   ☐ YES ☐ NO *(if no, record answer and abandon interview)*

2. Do you ever shop at or visit these businesses on 1st Avenue?
   ☐ YES, REGULARLY ☐ SOMETIMES, NOT REGULARLY
   Can you estimate the amount of money you spend at stores on 1st Ave. on average during a typical week or month?
   $ ____________ per week/month *(circle appropriate period)*

   What specific types of stores/services do you visit on 1st Ave
   Most Often? ______________________________
   Less Often? ______________________________

   ☐ NO, Are there any specific reasons why you don't shop at these stores even though they are located near the hospital?
   ____

3. Are there any other specific things that you like or dislike about the 1st Avenue business area? ☐ YES ☐ NO
   LIKES: ______________________________
   DISLIKES ______________________________

4. Would you like to see more businesses/services located on 1st Avenue in the future?
   ☐ YES, What specific kinds of new stores, restaurants, services, or businesses would you like to see more of?
   ____
   If these new businesses were available, would you likely shop on 1st Avenue Much More Often, a Bit More Often, or About the Same Amount as before? *(circle appropriate response)*
   What one type of new store or service would you visit most?
   ____
   ☐ NO, Are there any specific reasons why not?
   ____

5. **We would like to know if you would shop at 1st Avenue businesses more often if each of the following changes occured in the future. For each of the following possible improvements to 1st Ave, please rate each on a scale of 1 to 5, where "1" means you would not shop at 1st Ave. stores more often, "3" means you might shop a bit more at 1st Ave. stores, and "5" means you would shop much more often at 1st Ave. stores.**

   - New sidewalks, streetlights, benches and trees 1 2 3 4 5
   - Adding additional stores and services to 1st Avenue 1 2 3 4 5
   - Replacing part of the north hospital parking lot with new stores and services on the south side of 1st Avenue. 1 2 3 4 5
   - Improving the supply of customer parking in the area. 1 2 3 4 5
   - Improvements to new and existing buildings to provide coordinated colours, signage and design along a "European Village" theme 1 2 3 4 5
   - More advertising of the goods and services available on 1st Avenue 1 2 3 4 5
   - Slower traffic and safer pedestrian crossings on 1st Avenue 1 2 3 4 5
   - More sales and promotional events by 1st Ave stores 1 2 3 4 5

   COMMENTS: ______________________________

6. What is your association with this institution?
   staff/administration — patient — visitor — *(circle appropriate response))*

TO BE COMPLETED BY INTERVIEWER: Interviewer's Name ____________
Name of Institution: ______________________________
Age and Sex of Respondent: 18-34 35-49 50 & Over M F

Table 1:
HOSPITAL USERS WHO SHOP AT 1st AVENUE BUSINESSES

	STAFF		PATIENTS		VISITORS		TOTAL	
	#	%	#	%	#	%	#	%
Regularly	13	19%	2	17%	2	5%	17	15%
Sometimes But Not Regularly	39	58%	5	42%	9	24%	53	46%
Never	15	22%	5	42%	26	70%	46	40%
Total Respondents	67	100%	12	100%	37	100%	116	100%

Table 2:
AVERAGE SPENT PER MONTH AT 1st AVENUE BUSINESSES
(Base includes respondents who shop regularly or sometimes)

	STAFF		PATIENTS		VISITORS		TOTAL	
	#	%	#	%	#	%	#	%
Less than $10	8	15%	0	0%	2	18%	10	14%
$10 to $25	19	37%	1	14%	1	9%	21	30%
$26 to $50	5	10%	2	29%	0	0%	7	10%
$51 to 75	2	4%	0	0%	2	18%	4	6%
$76 to $100	6	12%	0	0%	1	9%	7	10%
Over $100	0	0%	0	0%	0	0%	0	0%
Don't Know / No Response	12	23%	4	57%	5	45%	21	30%
Total Respondents	52	100%	7	100%	11	100%	70	100%

Table 3:
SPECIFIC STORES AND SERVICES VISITED
(Base = 70 respondents who shop on 1st Avenue. Multiple responses permitted)

	STAFF		PATIENTS		VISITORS		TOTAL WHO VISIT	
	Most Often	Less Often	Most Often	Less Often	Most Often	Less Often	#	% (*)
Bakery	26	1	1	–	3	2	33	47%
Supermarket / Deli	13	4	2	–	2	1	22	31%
Restaurants / Pizza	15	10	3	1	4	3	36	51%
Drugstore	9	4	1	–	1	1	16	23%
Convenience Store	11	3	1	–	1	–	16	23%
Bank	4	–	–	–	2	–	6	9%
Florist	1	1	–	–	1	1	4	6%
Gas Station	1	1	–	–	–	1	3	4%
Post Office	1	–	–	–	–	–	1	1%
Video Rentals	1	–	–	–	–	–	1	1%

NOTE: (*) represents % of 70 respondents who shop on 1st Avenue that visit a specific type of store or service.

Table 4:
REASONS FOR NOT SHOPPING ON 1st AVENUE
(Base = 46 respondents who do not shop on 1st Avenue. Multiple responses permitted.)

	STAFF		PATIENTS		VISITORS		TOTAL	
	#	%	#	%	#	%	#	%
Not normally in the area, Shop closer to home, Live & shop out of town:	6	38%	3	50%	19	70%	28	57%
Too busy in hospital, Can't get out, Night shift, Here Only To Work, No Time to shop:	6	38%	2	33%	2	7%	10	20%
Nothing there I need:					3	11%	3	6%
Not Interested:	2	13%					2	4%
Don't Know / No Response	2	13%	1	17%	3	11%	6	12%
Total Responses:	16	100%	6	100%	27	100%	49	100%

Table 5:
SPECIFIC LIKES AND DISLIKES ABOUT 1st AVENUE

	STAFF		PATIENTS		VISITORS		TOTAL	
	#	%	#	%	#	%	#	%
Those With Comments	23	34%	3	25%	15	41%	41	35%
Those Without Comments	44	66%	9	75%	22	59%	75	65%
Total Respondents	67	100%	12	100%	37	100%	116	100%
WHAT HOSPITAL USERS LIKE:								
Convenient stores	7						7	
General appearance & attractive buildings	4		1		1		6	
Restaurants	4				1		5	
Italian shops/ethnic flavour	2		1		2		5	
Small shops	2						2	
Bakery	2						2	
WHAT HOSPITAL USERS DON'T LIKE								
No fast food / coffee shops					2		2	
Poor variety of restaurants					3		3	
Restaurants too expensive					2		2	
Traffic congestion / speed	1		1		2		4	
No common operating hours	1				1		2	
Lack of parking	7				3		10	
Poor building condition					1		1	
Poor wheelchair access			1				1	
No large retail stores	2						2	
No traffic lights	1						1	
No sidewalks	1						1	
Stores too spread out	1						1	

Table 6:
SUPPORT FOR NEW BUSINESS GROWTH ON 1st AVENUE

	STAFF		PATIENTS		VISITORS		TOTAL	
	#	%	#	%	#	%	#	%
Would Like To See More Businesses in Future	39	58%	2	17%	20	54%	61	53%
Would Not Like To See MoreBusinesses	27	40%	9	75%	10	27%	46	40%
Don't Know / No Response	1	1%	1	8%	7	19%	9	8%
Total Respondents	67	100%	12	100%	37	100%	116	100%

SPECIFIC NEW STORES AND SERVICES SUGGESTED
(Base = 61 respondents who would like to see more stores)

Coffee shops / fast food	6		5	11
Family restaurants	6		5	11
Auto services	4			4
Bank Branches	4			4
Sidewalk Cafe	3			3
Butcher Shop	2			2
Health Food			2	2
Ethnic Shops	1		1	2
Flowers	1		1	2
Cothing/Fashion	2		1	3
Food/Grocery	6		2	8
Donut Shop	1		1	2
Kids Playground			1	1
Ice Cream Shop			1	1
Department Store			1	1
All night restaurant			1	1
Gifts Shop	1		1	2
Enclosed Mall	1	1		2
English Pub	1			1
Galleries & Specialty shops	7			7
Dry Cleaning	2			2
Post Office	2			2
Toys & Crafts	3			3
Sporting Goods	1			1

Table 6 continued:
SUPPORT FOR NEW BUSINESS GROWTH ON 1st AVENUE

EFFECT OF NEW STORES ON SHOPPING FREQUENCY
(Base = 61 respondents who would like to see more stores)

	STAFF		PATIENTS		VISITORS		TOTAL	
	#	%	#	%	#	%	#	%
Shop Much More Often	23	59%	1	50%	8	40%	32	52%
Shop A Bit More Often	11	28%	1	50%	4	20%	16	26%
Shop the Same Amount	0	0%	0	0%	2	10%	2	3%
Don't Know / No Response	5	13%	0	0%	6	30%	11	18%
Total Respondents	39	100%	2	100%	20	100%	61	100%

REASONS FOR NOT WANTING MORE BUSINESSES ON 1st AVENUE
(Base = 55 respondents who do not want to see more businesses)

	STAFF		PATIENTS		VISITORS		TOTAL	
	#	%	#	%	#	%	#	%
Like area the way it is	6	21%					6	12%
Enough stores already	3	10%	1	11%			4	8%
Don't live here/shop at home	7	24%	1	11%	4	29%	12	23%
Too much traffic already	2	7%			1	7%	3	6%
Competition					1	7%	1	2%
No time to shop here	2	7%			1	7%	3	6%
Hospital area should be quiet			1	11%				
Inconvenient hours	1	3%					1	
Difficult to access w/o car			1	11%			1	2%
						0%		
Don't Know / No Response	8	28%	5	56%	7	50%	20	38%
Total Respondents	29	100%	9	100%	14	100%	52	100%

Table 7:
EFFECTIVENESS OF POSSIBLE 1st AVENUE INITIATIVES
(Base = 116 respondents. 1= would not shop more often. 5= would shop much more often)

	STAFF		PATIENTS		VISITORS		TOTAL	
	#	%	#	%	#	%	#	%
New sidewalks, streetlights, benches & trees								
1	34	51%	9	75%	21	57%	64	55%
2	3	4%	0	0%	2	5%	5	4%
3	12	18%	2	17%	6	16%	20	17%
4	7	10%	0	0%	3	8%	10	9%
5	11	16%	0	0%	5	14%	16	14%
NR/DK	0	0%	1	8%	0	0%	1	1%
Total	67	100%	12	100%	37	100%	116	100%
Additional stores & services								
1	17	25%	6	50%	12	32%	35	30%
2	10	15%	2	17%	1	3%	13	11%
3	19	28%	3	25%	9	24%	31	27%
4	7	10%	0	0%	5	14%	12	10%
5	14	21%	1	8%	10	27%	25	22%
NR/DK	0	0%	0	0%	0	0%	0	0%
Total	67	100%	12	100%	37	100%	116	100%
Stores on south side of 1st Ave								
1	25	37%	9	75%	26	70%	60	52%
2	5	7%	0	0%	0	0%	5	4%
3	10	15%	2	17%	5	14%	17	15%
4	9	13%	0	0%	2	5%	11	9%
5	10	15%	1	8%	3	8%	14	12%
NR/DK	8	12%	0	0%	1	3%	9	8%
Total	67	100%	12	100%	37	100%	116	100%
Improved Customer Parking								
1	30	45%	7	58%	17	46%	54	47%
2	2	3%	0	0%	2	5%	4	3%
3	7	10%	2	17%	3	8%	12	10%
4	15	22%	1	8%	6	16%	22	19%
5	10	15%	2	17%	6	16%	18	16%
NR/DK	3	4%	0	0%	3	8%	6	5%
Total	67	100%	12	100%	37	100%	116	100%

1st Avenue NE Hospital User Survey

	STAFF		PATIENTS		VISITORS		TOTAL	
	#	%	#	%	#	%	#	%
European Village Theme								
1	19	28%	6	50%	11	30%	36	31%
2	2	3%	0	0%	2	5%	4	3%
3	16	24%	3	25%	7	19%	26	22%
4	10	15%	1	8%	7	19%	18	16%
5	19	28%	2	17%	8	22%	29	25%
NR/DK	1	1%	0	0%	2	5%	3	3%
Total	67	100%	12	100%	37	100%	116	100%
More advertising								
1	18	27%	8	67%	13	35%	39	34%
2	7	10%	0	0%	2	5%	9	8%
3	20	30%	2	17%	8	22%	30	26%
4	8	12%	1	8%	8	22%	17	15%
5	14	21%	1	8%	4	11%	19	16%
NR/DK	0	0%	0	0%	2	5%	2	2%
Total	67	100%	12	100%	37	100%	116	100%
Slower Traffic/Safer Crossings								
1	39	58%	9	75%	21	57%	69	59%
2	3	4%	1	8%	4	11%	8	7%
3	7	10%	0	0%	5	14%	12	10%
4	6	9%	0	0%	3	8%	9	8%
5	12	18%	2	17%	2	5%	16	14%
NR/DK	0	0%	0	0%	2	5%	2	2%
Total	67	100%	12	100%	37	100%	116	100%
More sales and promotions								
1	18	27%	8	67%	17	46%	43	37%
2	2	3%	0	0%	1	3%	3	3%
3	17	25%	2	17%	8	22%	27	23%
4	14	21%	1	8%	6	16%	21	18%
5	16	24%	1	8%	4	11%	21	18%
NR/DK	0	0%	0	0%	1	3%	1	1%
Total	67	100%	12	100%	37	100%	116	100%

Table 7b:
EFFECT OF SELECTED IMPROVEMENTS ON SHOPPING FREQUENCY
(Summary for combined responses of hospital staff, visitors, and patients)

	LIKELIHOOD OF VISITING MORE OFTEN					DON'T KNOW	OVERALL SCORE	AVERAGE SCORE
	UNLIKELY		--------------------		VERY LIKELY			
POSSIBLE CHANGE	1	2	3	4	5			
Improvements to Sidewalk, New Streetlights, Benches	64	5	20	10	16	1	254	2.21
Additional Stores & Services	35	13	31	12	25	0	327	2.82
Replace Part of Hospital Parking Lot With New Stores	60	5	17	11	14	9	235	2.20
Improving Supply of Customer Parking in Area	54	4	12	22	18	6	276	2.51
"European Village" Theme	36	4	26	18	29	3	339	3.00
More Advertising	39	9	30	17	19	2	310	2.72
Slower Traffic & Safer Pedestrian Crossings	69	8	12	9	16	2	237	2.08
More Sales and Promotional Events	43	3	27	21	21	1	319	2.77

1st Avenue NE Hospital User Survey

COMMENTS BY PATIENTS

— Spends 5 months per year in hospital in wheelchair and visits local businesses as part of therapy.
— Keep the area clean and neat, prefer new buildings
— Would like to see better bus transportation
— Don't come here to shop. Wouldn't want to carry parcels from hospital to home.
— As an inpatient I can't get out to shop anyway.

COMMENTS BY VISITORS

— Don't reduce hospital parking for new stores.
— All the restaurants were closed yesterday at 4:30 pm.
— Need more benches for patients and visitors to sit on.
— Stores would need to better than the stores where I live for me to shop here. The local community should support 1st Avenue stores.
— I like the area the way it is but would like to see it become more like Kensington.
— The area needs additional parking to make shopping convenient.
— I'd like to see it "spruced up" to give additional pride in the area.
— More like Kensington
— I visit often and would eat lunch often if there was a restaurant with quick, healthy food.

COMMENTS BY HOSPITAL STAFF

— More like Kensington
— Specialized shops would make it a community
— New stores should serve patients and the community. If you want another Kensington it should be downtown.
— I prefer to shop downtown. Don't turn this area into another shopping centre.
— Seems to have everything we need already. Nice as it is.
— Don't sacrifice hospital parking. Not enough for staff or visitors now.
— I support all these things as long as it doesn't cost us money.
— I will shop here as long parking remains easily available. It's not bad now - keep it that way.
— I have hospital parking anyway. Tie the retail into the hospital so we can easily walk to shops and restaurants.
— The exisitng stores are already convenient to the hospital.
— Would like to see the area become more trendy.
— European theme would look very good.
— Merchants should advertise in hospital paper or provide flyers.
— City bakery is very appealing to look at.
— Would like to see slower traffic.
— If more stores, then more parking will be needed.
— Family-oriented activities, the community needs to be retained.
— More character and cultural identity would be great.
— More stores like a post office and Co-op grocery would be handy for staff.
— 1st Avenue does need a facelift.
— More advertising inside the hospital for staff. I like the people I'v met at the Bridgeland-Riverside parade.
— I shop in my own area where I live. I'm only at the hospital to work.
— The area needs to be brightened up and improved
— The area really needs some inexpensive fast food outlets.
— I finish work and pick up the kids. Prices would have to be competitive.

Table 8:
DEMOGRAPHIC CHARACTERISTICS OF RESPONDENTS
(Base = 116 respondents.)

	STAFF		PATIENTS		VISITORS		TOTAL	
	#	%	#	%	#	%	#	%
AGE GROUP								
18 to 34	25	37%	3	25%	8	22%	36	31%
35 to 49	31	46%	5	42%	16	43%	52	45%
Over 50	11	16%	4	33%	13	35%	28	24%
Total Respondents	67	100%	12	100%	37	100%	116	100%
SEX								
Female	46	69%	9	75%	21	57%	76	66%
Male	21	31%	3	25%	16	43%	40	34%
Total Respondents	67	100%	12	100%	37	100%	116	100%

APPENDIX E:
ALBERTA RETAIL STATISTICS

Table E1:

INCOME AND RETAIL EXPENDITURE RELATIONSHIPS, ALBERTA, 1983-1991

	1983	1986	1987	1988	1989	1990	1991
Retail Sales ($ millions)	11,303.5	15,694.0	16,283.0	17,486.0	18,770.6	19,878.2	18,856.9
Retail Sales Per Capita ($)	4,833	6,608	6,847	7,319	7,737	8,041	7,477
Total Personal Disposable Income ($ millions) (1)	28,157.0	34,060.0	34,274.0	37,997.0	40,454.0	42,523.0	44,000.0
Personal Disposable Income Per Capita ($)	12,038	14,341	14,413	15,905	16,675	17,202	17,446
Retail Sales to Income (%)	40.1	46.1	47.5	46.0	46.4	46.7	42.9
Population	2,339,000	2,375,000	2,378,000	2,389,000	2,426,000	2,472,000	2,522,000

Data Source: Statistics Canada Catalogue No. 13-201 and No. 63-005.
(1) 1991 total PDI estimated by WBUC based on historical trends, 1991 retail sales and 1991 population

TabE1

Table E2:

ALBERTA RETAIL SALES BY TRADE GROUP / 1989 - 1991

(millions of dollars)

	1989		1990		1991	
Supermarkets & Grocery	3,775.8	20.1%	3,974.7	20.0%	4,176.4	22.1%
Other Food Stores (1)	187.7	1.0%	198.8	1.0%	188.6	1.0%
Drugstores	933.9	5.0%	969.4	4.9%	939.8	5.0%
SUBTOTAL: CONVENIENCE	4,897.4	26.1%	5,142.9	25.9%	5,304.8	28.1%
General Merchandise (2)	2,568.6	13.7%	2,767.8	13.9%	2,771.8	14.7%
Clothing & Shoes	1,091.1	5.8%	1,116.4	5.6%	1,066.0	5.7%
Household Furnishings & Appliances (3)	750.8	4.0%	795.1	4.0%	754.3	4.0%
Other Durable Goods (4)	632.9	3.4%	645.6	3.2%	582.9	3.1%
Other Semi-Durable Goods (5)	796.8	4.2%	751.3	3.8%	747.2	4.0%
SUBTOTAL: DSTM	5,840.2	31.1%	6,076.2	30.6%	5,922.2	31.4%
AUTOMOTIVE	6,805.7	36.3%	7,294.6	36.7%	6,413.4	34.0% 0.0%
OTHER RETAIL STORES	1,227.3	6.5%	1,364.5	6.9%	1,216.5	6.5%
TOTAL: ALL STORES	18,770.6	100.0%	19,878.2	100.0%	18,856.9	100.0%

Data Source: Statistics Canada Catologue No. 63-005. Other Food Stores and Household Furnishings estimated by WBUC based on 1986-1989 historical average share of sales.

1 Includes grocery stores other than supermarkets, bakeries, candy, fruit & vegetable, meat markets and other specialty food stores.
2 Includes department stores, variety and general merchandise stores.
3 Includes household furniture, applicances, and TV/radio/stereo stores.
4 Includes sporting goods, musical instruments, records, jewellery, cameras & supplies, etc.
5 Includes books & stationery, florists, hardware, paint & wallpaper, toys, hobby, etc.
6 Includes liquor, beer, wine stores, art, pets, luggage opticians, and stores not elsewhere classified.